

*SF Dept of City Planning*

# COMMERCIAL AND INDUSTRY INVENTORY

San Francisco Department of City Planning

OASIS

June 1992





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*Commerce and Industry Element of the Master Plan*  
*First Annual Inventory*

**COMMERCE AND INDUSTRY INVENTORY**

June 1992

*San Francisco Department of City Planning  
Office of Analysis and Information Systems (OASIS)*

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This is the first of a series of Commerce and Industry Annual Inventories which will summarize San Francisco's basic economic indicators in a standard format over time. This Inventory also sets the background for review and update of the Commerce and Industry Element of the San Francisco Master Plan. Information included in this Inventory will be used to analyze in detail critical economic issues. Reports on these issues will be presented for public comment and review by government agencies. After these reports, the Department will prepare a Draft Commerce and Industry Element for public review and City Planning Commission consideration.

Early drafts of this Inventory were reviewed by Sally Nielsen of Recht Haustrath and Associates. The Bureau of Building Inspection provided building permit application data reported in this inventory. Miriam Chion researched and prepared this Inventory and Catherine Bauman assisted in writing it.

If you have any questions regarding this Inventory or would like to be notified of the availability of future Commerce and Industry reports, Inventories, or other documents please call or write: Miriam Chion, Department of City Planning, 450 McAllister Street, San Francisco, CA 94102, telephone (415) 558-6314, fax (415) 558-6426.

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County Business Patterns  
Employment Development Department  
San Francisco Department of City Planning  
San Francisco Office of the Controller  
Standard Industrial Classification Manual  
US Department of Commerce  
US Department of Commerce, Bureau of Economic Analysis  
US Department of Commerce, Bureau of Census

# 1.0 INTRODUCTION

The San Francisco Commerce and Industry Inventory is a compilation of information that can be used to describe the city's economic activities. The data included are about employment, establishments, transactions such as revenues and expenditures of businesses and government, and land use and building permits. This inventory summarizes existing data collected by various public and private agencies within a consistent format that allows for comparisons and cross-references. This first Inventory sets up the basis for a series of annual inventories which will refine data formats and eliminate inconsistencies by processing more detailed data, similar to the widely used Housing Inventory Series.

The data presented in this document provide a basic framework for economic analysis and policy formulation. While the immediate goal is to make local economic data available to the Department and other public and private agencies, the long term goals are to provide a consistent format within which data can be compared over time, and to layout the preliminary information for updating the Commerce and Industry Element of the Master Plan.

The Inventory is organized into four sections: **1.0 Introduction; 2.0 Regional Overview, and 3.0 San Francisco Economic Indicators**. The **Introduction** explains how the various sections of the inventory are organized, describes the methodology, and defines the data formats that are used throughout the document.

The second section, **Regional Overview**, presents San Francisco's economy in its historical and geographical context by reviewing population, labor force, and employment indicators of the Bay Area for the last twenty years.

The third section, **San Francisco Economic Indicators** is the main body of the Inventory. This section summarizes data from various agencies which are organized in four sections by employment, establishments, transactions, and land and building uses.

To make the information useful for different purposes, it has been arranged as follows. Much of the presentation is driven

by the format of the data that is available. The employment data, for example, describe city-wide trends by Land Use Activities from 1976 to the present, but distribution by district for the most important industries in San Francisco is only available for 1987.

Establishments data, also presented by Land Use Activities, focus on the distribution of business establishments by specific industries, by geographical areas, and by establishment size for 1987. Each Land Use Activity is subdivided by industry groups to the two-digit SIC level. Commerce and Industry districts and zip code are the two geographical units used to describe the distribution of establishments. According to the number of employees, establishments are also classified by size.

Transactions information include data related to wages, proprietors' income, business revenues, and city revenues and expenditures. While employment and establishments measure the city's economic activity in terms of number of people and businesses, transactions provide indicators to measure the size of the city's economy in monetary terms. Wages and proprietors income figures are presented by Land Use Activities and by industry groups (SIC), describing changes over last decade. Business revenue data cover some main industries for 1982 and 1987. Data about city revenues and expenditures are presented for the 1980s.

Land and building uses provide a spatial measure of the size and location of economic activities. The land use section includes commercial, industrial, and residential zoning information for the entire city and current land use information for portions of the city. Building uses summarize building permit applications for new buildings and alterations in 1990. These data are organized by uses, status of application, and distribution by commerce and industry districts.

## 1.1 Data formats

The data presented for the indicators mentioned above are described over time and in terms of size, type of activity, and geographical distribution. Depending upon available data and the need to show specific trends, the period of time covered ranges from a single year to the past two decades. The magnitude of the different indicators is measured by their own specific units such as employees, establishments, dollars, permits, etc.

For the type of activity and geographical distribution of those activities, the Commerce and Industry inventory sets specific data formats to provide a consistent framework for comparisons and cross-references among indicators. The data gathered from different sources in different formats are aggregated by predefined Land Use Activity classification and Commerce and Industry Districts. However, some of the data remain in their original formats because of limited detail; for example if the data are not disaggregated to two-SIC digits, they are presented in their original SIC format.

SIC refers to the Standard Industrial Classification established by the U.S. Census Bureau to categorize all industries and economic activities. This classification system categorizes business establishments according to the kind of product or service they provide. The SIC system is hierarchical. The first digit indicates the broadest categorizations, the first two digits major industry groups within those broad categories, the first three digits industry groups, and the first four digits industries. This inventory generally uses two and three digit SIC codes.

The **LAND USE ACTIVITY** classification is derived from the Standard Industrial Classification (SIC) and space use categories, by dividing all industry groups and space categories into six main activities based on the use of the land or space that the industry occupies. The Land Use Activity classification enables the translation of economic information for use in land use policy development. It matches the type of economic activity with the type of building structure and the land use pattern. This classification allows evaluations of employment, establishments, and transactions within their physical environment. Since this classification has been built based on San Francisco activities and land use patterns, its application to any environment outside of the city may require some adjustments. For example, San Francisco mining activities are characterized as Office, which is not the case in other counties.

The activities defined within this classification are **Office, Retail, Industrial, Hotel, Cultural/Institutional**, and government. Each of these activities has a defined type of space and a set of industry groups, as specified in the table below (Land Use Activities classification). The space use, as indicated in the table, describes the characteristics of the building structure and its use. Industry groups included belong to the SIC described by 1 to 3 digit codes.

**Office** activity includes mainly professional services such as architecture, engineering, real estate, computer services, research and development activities and government administrative functions. There are three types of space consid-

Table 1.2.1

| LAND USE ACTIVITY<br>Space Use  | EMPLOYMENT INDUSTRY GROUPS   | CODE   |
|---|--|--|
| <b>OFFICE ACTIVITY</b><br><br><i>Examples: Headquarters offices, professional services, branch bank.</i>                                    | Agriculture & mining<br>Transportation services<br>F.I.R.E<br>Business services<br>Physician & dentist office<br>Legal services<br>Engineering & architecture<br>Management<br>Accntng, research, & other serv.<br>Public administration                           | 0,1<br>47<br>6<br>73<br>801-4<br>81<br>871<br>874<br>872-3,89<br>9                         |
| <b>RETAIL ACTIVITY</b><br><br><i>Examples: Stores, restaurants, bars, commercial parking lots.</i>  | Department stores<br>Food stores<br>Apparel & accessory stores<br>Eating & drinking places<br>Other retail stores<br>Personal services<br>Auto repair and services<br>Automobile parking<br>Miscellaneous repair services  | 53<br>54<br>56<br>58<br>52,5,7,9<br>72<br>751,3,4<br>752<br>76                             |
| <b>INDUSTRIAL ACTIVITY</b><br><br><i>Examples: Warehouses, factories, workshops, showrooms, port facilities.</i>                            | Food manufacturing<br>Apparel manufacturing<br><br>Printing & publishing<br>Electronic manufacturing<br>Other manufacturing<br>Durable goods wholesale<br>Non durable goods wholesale<br>Construction<br>Transportation<br>Communication<br>Other public utilities | 20<br>23<br><br>27<br>36<br>30-5, 37-9<br>50<br>51<br>15-17<br>40-2,44-5<br>48<br>43,46,49 |
| <b>HOTEL ACTIVITY</b><br><br><i>Examples: hotels, motels, B&amp;Bs.</i>   | Hotel  | 70   |
| <b>CULTURAL/<br/>INSTITUTIONAL ACTIVITY</b><br><br><i>Examples: Hospitals, libraries, schools, theaters, churches, museums, nightclubs.</i> | Health services<br>Educational services<br>Social services<br>Museums<br>Membership organizations<br>Amusement & recreation<br>Motion picture  | 805-09<br>82<br>83<br>84<br>86<br>79<br>78   |
| <b>GOVERNMENT ACTIVITY</b><br><br><i>Can Include Office, Industrial, Cultural/ Institutional spaces.</i>                                    | Federal<br>State<br>Local  |  |

## LAND USE ACTIVITY CLASSIFICATION

Sources:

Department of City Planning  
Standard Industrial Classification

ered: primary offices which mainly include headquarters and large firms in high density buildings; secondary offices which include small professional offices and services; including walk-in customer banking facilities. In some cases office space and activity are difficult to identify and isolate from other types of space and activities because many offices have been created by remodelling warehouses or other industrial buildings or even residential space, or they are accessory to other activities.

**Retail** activity includes large and small scale sales and services to walk-in customers, such as department stores, galleries, and eating and drinking establishments (restaurants, bars, fast food service, delicatessens, etc.). This category also includes neighborhood services and shops such as dry cleaners, auto repair shops, beauty shops, etc. Activity and space use are better correlated for Retail activity than for Office activity.

The **Industrial** category covers activities related to processing of goods and provision of city-wide infrastructure. It includes manufacturing, wholesale, construction, transportation, communication, and public utilities. Most of these activities take place in large buildings and structures that can house machinery and industrial equipment. However, some of the food manufacturing and printing activities are located in small shops due to the small scale of production and machinery required.

**Hotel** activity is defined as a separate Land Use Activity because it has a direct relationship to the visitor sector and constitutes a specific type of land use and building structure. It includes any type of lodging such as hotel, motel, bed and breakfast.

**Cultural/Institutional** activities cover the social spectrum of the economy by including health and educational services as well as entertainment and artistic activities. This category covers the widest variety of space type which varies from large establishments (hospitals, schools, museums, etc.) to small studios or businesses (nightclubs, art studios, etc.).

**Government** activity combines Office, Industrial, and Cultural/Institutional activities developed as public services and government administration. This category is not characterized by specific activity, space, or land use pattern but is defined as a separate category because several data sources classify government as a separate employment or establishment

category to facilitate standard economic analysis.

**Residential** activity is an additional category that is only considered when describing land or building uses. It does not correspond to any employment, business, or transaction classification.

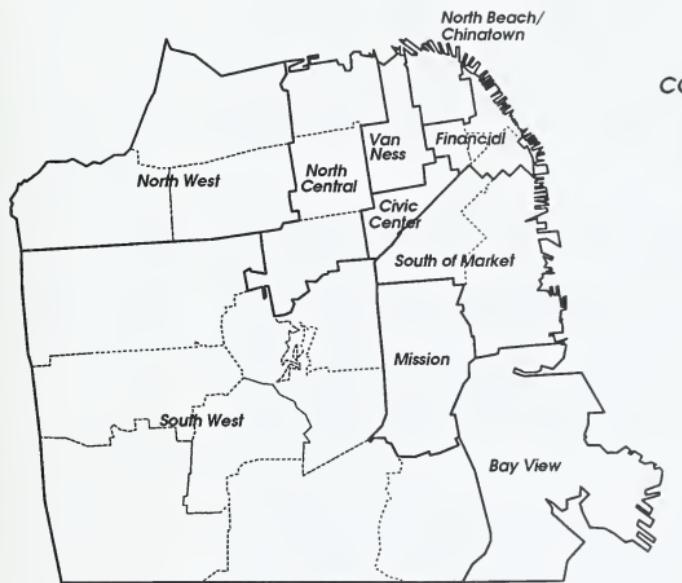
The **COMMERCE AND INDUSTRY (C&I) DISTRICTS** are characterized by predominant economic activities, employment concentration, business density, and spatial characteristics. Each district is defined by one or more zip codes, because zip code is usually the smallest geographical unit for which economic data are available. The district boundaries were also established to be as close as possible to census tract boundaries, so that data available from the census can be meaningfully compared to economic data. The C&I districts are shown on the map below.

Districts in the East side of the city are defined by their specialization in one type of Land Use Activity or similar neighborhood commercial activities, such as Mission, North Beach/Chinatown District, Bay View, South of Market, Civic Center and North Central Districts.

Districts in the north and east areas of the city, where establishments are very concentrated, are usually small, such as the Financial, or Van Ness Districts. In the west side of the city, where economic activities are relatively dispersed and the predominant land use is residential, districts tend to be larger.

In this first Inventory, it was not possible to present all data by Land Use Activity and C&I district. As data sources and collection improve, it is intended to consistently use this framework in the C&I annual series for purposes of comparison and trend analysis.

MAP 1.1



COMMERCE  
AND  
INDUSTRY  
DISTRICTS

## 2.0 REGIONAL OVERVIEW

San Francisco plays an important role as an urban center with diverse linkages to the regional, state, and national economies. Because of this role, some historical and regional references have been included in the inventory for a better understanding of current San Francisco trends. This section looks at the Bay Area population, labor force and employment and the distribution of regional employment by industry groups, since 1970.

According to the US Department of Commerce, which is the source for this data, **labor force** includes employed persons, unemployed persons, and members of the armed forces. Unemployment is defined as "...civilians 16 years old and over not at work who were actively looking for work during the last four weeks and were available to accept a job or who were waiting to be called back to a job from which they have been laid off. Labor force data are collected by place of residence; a member of the labor force who lives in the East Bay is part of the East Bay labor force, no matter where he or she is employed.

**Employment** includes "civilians 16 years old and over who were either: at work... or temporarily absent from work due to illness, vacation, strike, or other personal reasons." Employment data are collected by place of employment. Someone holding a job in San Francisco is part of the San Francisco employment pool no matter where he or she lives.

The regional data included in this section has been summarized by four subregions: North Bay, East Bay, South Bay, and San Francisco. These subregions group the nine counties in the Bay Area based on their geographic location and commute patterns. The North Bay includes Marin, Sonoma, Napa, and Solano counties. The East Bay includes Contra Costa and Alameda counties. The South Bay includes Santa Clara and San Mateo counties. San Francisco is defined by its county boundaries.



## SAN FRANCISCO BAY AREA

## 2.1 EMPLOYMENT, POPULATION, AND LABOR FORCE WITHIN THE BAY AREA

San Francisco has a very diverse employment base which is generated from a regional labor force. During the last half of the century we have observed an increasing employment in the city which has almost double, while the resident population has decreased by seven percent.



Graph 2.1.1

This convergence of employment and population illustrates the increasing regional participation in the city's employment base.

NOTE : The sharp rise in employment between 1970 and 1975 is partially explained by the inclusion of the self-employed and other government employment data since 1972 by the Department of Human Resource Development which is the source for this information.

The following tables, 2.1.1, 2.1.2, and 2.1.3, show the regional distribution of population, labor force and employment in 1970, 1980, and 1990. These tables illustrate the large size of San Francisco employment in relation to its local labor force and population. They also show a comparison between San Francisco and the North Bay, East Bay, and South Bay. These three areas represent the labor force base for San Francisco and the region, and also define the three commute corridors into San Francisco.

When looking at the following tables it should be considered that, the Bay Area covers 7,041 square miles from which the North Bay represents 53 percent, the East Bay 21 percent, the South Bay 25 percent, and San Francisco less than 1 percent.

**Table 2.1.1** BAY AREA POPULATION, LABOR FORCE, AND EMPLOYMENT

| POPULATION    | 1970             | 1980             | 1990             |
|---------------|------------------|------------------|------------------|
| North Bay     | 660,004          | 860,668          | 1,059,700        |
| East Bay      | 1,623,573        | 1,761,759        | 2,072,300        |
| South Bay     | 1,620,948        | 1,887,029        | 2,141,700        |
| San Francisco | 715,674          | 678,974          | 723,959          |
| <b>TOTAL</b>  | <b>4,620,199</b> | <b>5,188,430</b> | <b>5,997,659</b> |
| LABOR FORCE   | 1970             | 1980             | 1990             |
| North Bay     | 262,621          | 421,445          | 525,300          |
| East Bay      | 689,331          | 886,769          | 1,106,700        |
| South Bay     | 692,719          | 1,023,630        | 1,169,000        |
| San Francisco | 351,169          | 370,408          | 394,200          |
| <b>TOTAL</b>  | <b>1,995,840</b> | <b>2,702,252</b> | <b>3,195,200</b> |
| EMPLOYMENT    | 1970             | 1980             | 1990             |
| North Bay     | 104,578          | 274,800          | 379,563          |
| East Bay      | 389,128          | 691,300          | 883,846          |
| South Bay     | 447,781          | 936,700          | 1,159,496        |
| San Francisco | 377,142          | 553,600          | 582,287          |
| <b>TOTAL</b>  | <b>1,318,629</b> | <b>2,456,400</b> | <b>3,005,192</b> |

Source: Department of City Planning  
US Department of Commerce

As shown in Table 2.1.2, population, labor force, and employment all increased between 1970 and 1990, and each of these variables increased in each decade in each subregion, except for a five percent decrease in San Francisco's population during the 1970s. In 1990, the total Bay Area population increased by 30 percent over 1970, reaching almost 6 million people; total employment increased by 128 percent, reaching about 3 million jobs, or about half the population size. San Francisco's population increased by only one percent (about 8,300 people), its labor force increased by 12 percent (about 43,000 people), while the number of jobs increased by 54 percent (about 205,000 jobs).

The proportion of the labor force which is unemployed or in the military is relatively small, and relatively stable over time compared to the total amount of employment. Consequently, examining the distribution of labor force and employment throughout the region, and how this distribution changes over

time, is an indication of the spatial organization of the region's economy. (However, subtracting labor force from employment is not an accurate measure of commuters, since some residents commute out of the city for jobs, and some members of the labor force are unemployed or in the military.)

San Francisco is the only subregion which has historically had (and has currently) more jobs than the resident labor force, indicating that people commute into San Francisco, and that economic activity is concentrated in San Francisco. The other three subregions have larger resident labor forces than the number of jobs. The growth in regional employment (128 percent) was greater than the growth in labor force (60 percent). When employment grows faster than labor force (other factors remaining the same) it indicates that workers are coming in from outside the region.

BAY AREA POPULATION, LABOR FORCE, AND EMPLOYMENT  
Percentage Change

Table 2.1.2

| POPULATION    | 1970-80   | 1980-90   | 1970-90    |
|---------------|-----------|-----------|------------|
| North Bay     | 30        | 23        | 61         |
| East Bay      | 9         | 18        | 28         |
| South Bay     | 16        | 14        | 32         |
| San Francisco | -5        | 7         | 1          |
| <b>TOTAL</b>  | <b>12</b> | <b>16</b> | <b>30</b>  |
| LABOR FORCE   | 1970-80   | 1980-90   | 1970-90    |
| North Bay     | 60        | 25        | 100        |
| East Bay      | 29        | 25        | 61         |
| South Bay     | 48        | 14        | 69         |
| San Francisco | 5         | 6         | 12         |
| <b>TOTAL</b>  | <b>35</b> | <b>18</b> | <b>60</b>  |
| EMPLOYMENT    | 1970-80   | 1980-90   | 1970-90    |
| North Bay     | 163       | 38        | 263        |
| East Bay      | 78        | 28        | 127        |
| South Bay     | 109       | 24        | 159        |
| San Francisco | 47        | 5         | 54         |
| <b>TOTAL</b>  | <b>86</b> | <b>22</b> | <b>128</b> |

Source: Department of City Planning  
US Department of Commerce

During the 1970s, Bay Area employment and labor force have grown faster than during the 1980s. Labor force increased 35 percent in the 70s and 18 percent in the 80s. Employment increased 86 percent in the 70s and 22 percent in the 80s.

Table 2.1.3 shows the percentage share of each of these three variables held by each of the subregions. San Francisco's share of the region's population has declined from 15 percent to 12 percent; the North Bay's share has increased from 14 percent to 18 percent; the other subregions have remained about the same. Similarly, San Francisco's share of the region's labor force has declined from 18 percent to 12 percent; the North Bay's share has increased from 13 percent to 16 percent; the other subregions have remained about the same. There has been a steady decentralization of jobs in relation to San Francisco. In 1970, 29 percent of the region's jobs were in San Francisco; in 1990 this had declined to 19 percent of the region's jobs. This loss of share was picked up by the North Bay, which share went from 8 percent to 13 percent; and the South Bay, which share went from 34 percent to 39 percent of the region's jobs.

**Table 2.1.3** BAY AREA POPULATION, LABOR FORCE AND EMPLOYMENT  
Percentage distribution by sub-region

| POPULATION    | 1970       | 1980       | 1990       |
|---------------|------------|------------|------------|
| North Bay     | 14         | 17         | 18         |
| East Bay      | 35         | 34         | 35         |
| South Bay     | 35         | 36         | 36         |
| San Francisco | 15         | 13         | 12         |
| <b>TOTAL</b>  | <b>100</b> | <b>100</b> | <b>100</b> |
|               |            |            |            |
| LABOR FORCE   | 1970       | 1980       | 1990       |
| North Bay     | 13         | 16         | 16         |
| East Bay      | 35         | 33         | 35         |
| South Bay     | 35         | 38         | 37         |
| San Francisco | 18         | 14         | 12         |
| <b>TOTAL</b>  | <b>100</b> | <b>100</b> | <b>100</b> |
|               |            |            |            |
| EMPLOYMENT    | 1970       | 1980       | 1990       |
| North Bay     | 8          | 11         | 13         |
| East Bay      | 30         | 28         | 29         |
| South Bay     | 34         | 38         | 39         |
| San Francisco | 29         | 23         | 19         |
| <b>TOTAL</b>  | <b>100</b> | <b>100</b> | <b>100</b> |

Source: Department of City Planning  
US Department of Commerce

## BAY AREA EMPLOYMENT

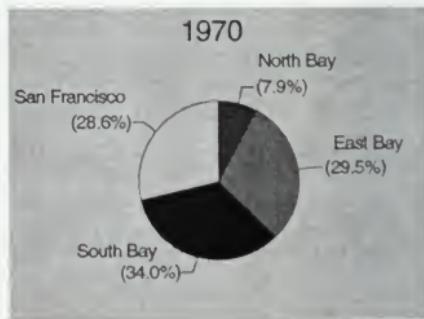
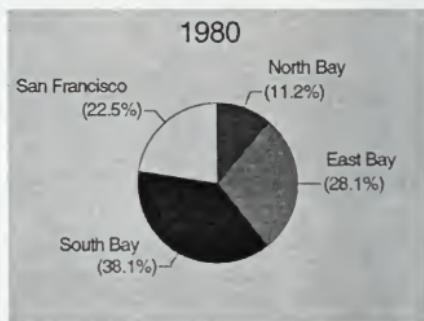
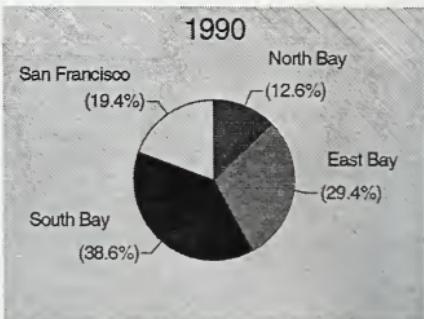
**Graph 2.1.2**

*Regional Distribution of Employment, Labor Force, and Population.*

From 1970 to 1990, San Francisco's share of regional population, labor force, and employment have decreased.

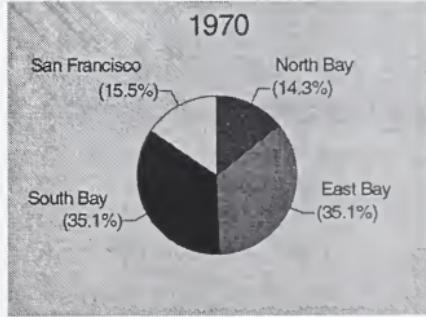
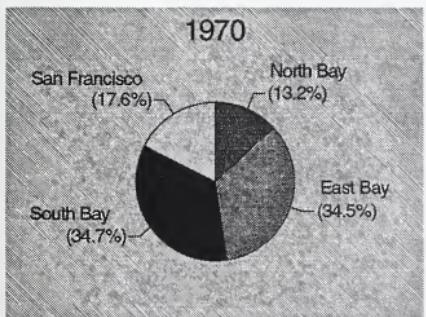
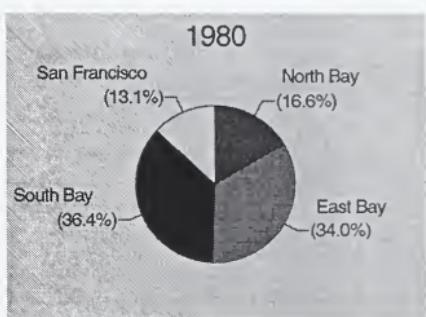
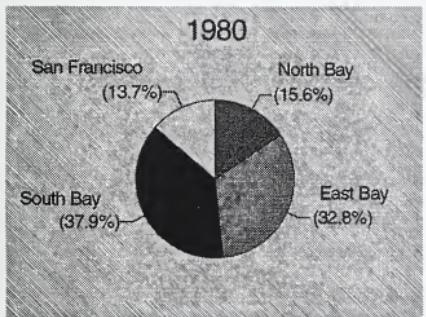
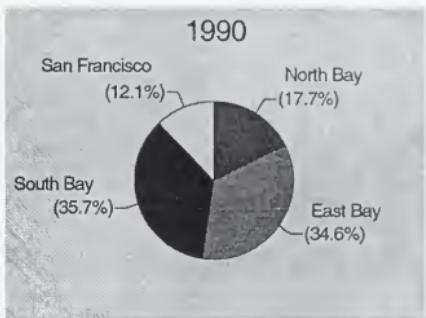
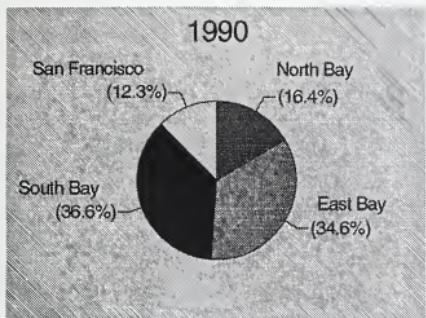
The North and South Bay have increased their regional shares.

The East Bay employment, labor force and population shares have remained the same over the two decades.



### BAY AREA LABOR FORCE

### BAY AREA POPULATION



## 2.2 REGIONAL EMPLOYMENT BY INDUSTRY GROUPS

The tables included in this section are based on Employment Development Department (EDD) data, covering the period from 1975 to 1990, for every five years. The employment data are classified by SIC groups at the one digit level. These data are presented, first, for the total Bay Area region by industry groups, and then each industry group is disaggregated into the four sub-regions: North Bay, East Bay, South Bay, and San Francisco. The tables presented in this section are organized as follows: first, absolute number of employees; second, percentage distribution by industry groups or sub-region; and third, the percentage change for every five year period.

Looking at the Bay Area total employment, from 1975 to 1990, we see a significant growth of more than fifty percent, reaching more than three million employees in 1990. The increase from 1975 to 1980 was 484,000 employees while the total increase from 1975 to 1990 was over one million employees.

From 1975 to 1990, employment in services showed the largest absolute increase of 430,000 employees and the largest percentage change of 107 percent while mining and agriculture showed the smallest increase of 500 employees which correspond to less than 2 percent. Retail, manufacturing and F.I.R.E. show the second largest growth with 200,000, 136,000 and 76,000, respectively. In terms of percentage change from 1975 to 1990, the construction industry showed the second largest percentage growth after services (89 percent). Retail, F.I.R.E. and wholesale trade have also shown a significant growth of 66, 57 and 55 percent respectively.

Currently, one-third of employment is in services, followed by retail, manufacturing and government. Service employment's share increased seven percentage points while government declined by six percentage points since 1975. The shares of manufacturing and retail have remained more or less the same over the period.

In terms of employment distribution by industry groups and sub-regions during 1990, F.I.R.E. was the industry with the largest percentage (36) of its employment located in San Francisco. With a smaller percentage, San Francisco has also a significant regional participation in communication and utilities, and service employment, with 27 and 24 percent respectively. The South Bay has increased its share of

**Table 2.2.1**

BAY AREA EMPLOYMENT BY INDUSTRY GROUPS  
(Thousands of jobs)  
1975-90

| INDUSTRY                 | 1975 | 1980 | 1985 | 1990 |
|--------------------------|------|------|------|------|
| SERVICES:                | 402  | 547  | 667  | 832  |
| RETAIL:                  | 301  | 391  | 453  | 501  |
| MANUFACTURING:           | 357  | 476  | 493  | 492  |
| F.I.R.E.:                | 136  | 183  | 203  | 213  |
| CONSTRUCTION:            | 78   | 105  | 126  | 147  |
| WHOLESALE TRADE:         | 113  | 138  | 158  | 175  |
| GOVERNMENT:              | 412  | 426  | 426  | 458  |
| TRANSPORTATION:          | 87   | 93   | 98   | 105  |
| COMMUNICATION/UTILITIES: | 59   | 68   | 75   | 69   |
| MINING/AGRICULTURE:      | 26   | 28   | 26   | 27   |
|                          | 1972 | 2456 | 2717 | 3074 |

In 1990, almost a third of the total employment was concentrated in services. It went from 20 percent of total employment in 1975 to 27 percent in 1990. Government employment lost its share within the region, going from 21 percent of total employment in 1975 to 15 percent in 1990. Retail and manufacturing were the following largest sectors with about 15 percent each and no significant change within the 15 year period. The smallest sectors were mining, agricultural, communication, and utilities, representing together about 3.1 percent of the total employment, which is a decline from a 4.3 percent share in 1975.

BAY AREA EMPLOYMENT BY INDUSTRY GROUPS  
Percentage distribution by industry groups  
-197590

| INDUSTRY                | 1975 | 1980 | 1985 | 1990 |
|-------------------------|------|------|------|------|
| SERVICES:               | 20   | 22   | 25   | 27   |
| RETAIL:                 | 15   | 16   | 17   | 16   |
| MANUFACTURING:          | 18   | 19   | 18   | 16   |
| F.I.R.E.:               | 7    | 7    | 7    | 7    |
| CONSTRUCTION:           | 4    | 4    | 5    | 5    |
| WHOLESALE TRADE:        | 6    | 6    | 6    | 6    |
| GOVERNMENT:             | 21   | 17   | 16   | 15   |
| TRANSPORTATION:         | 4    | 4    | 4    | 3    |
| COMMUNICATION/UTILITIES | 3    | 3    | 3    | 2    |
| MINING/AGRICULTURE:     | 1    | 1    | 1    | 1    |
|                         | 100  | 100  | 100  | 100  |

BAY AREA EMPLOYMENT BY INDUSTRY GROUPS  
Percentage Change  
-197590

| INDUSTRY                 | -197580 | -198085 | -198590 | -197590 |
|--------------------------|---------|---------|---------|---------|
| SERVICES:                | 36      | 22      | 25      | 107     |
| RETAIL:                  | 30      | 16      | 11      | 66      |
| MANUFACTURING:           | 33      | 4       | -0      | 38      |
| F.I.R.E.:                | 34      | 11      | 5       | 57      |
| CONSTRUCTION:            | 36      | 20      | 16      | 89      |
| WHOLESALE TRADE:         | 22      | 15      | 11      | 55      |
| GOVERNMENT:              | 3       | -0      | 7       | 11      |
| TRANSPORTATION:          | 7       | 5       | 7       | 21      |
| COMMUNICATION/UTILITIES: | 15      | 10      | -7      | 18      |
| MINING/AGRICULTURE:      | 8       | -9      | 4       | 2       |
|                          | 25      | 11      | 13      | 56      |

Source: Department of City Planning  
Employment Development Department

BAY AREA EMPLOYMENT BY INDUSTRY GROUPS AND SUB-REGIONS  
 (Thousands of jobs)  
 1975-90

Table 2.2.2

| CATEGORY/<br>Sub-region | 1975 | 1980 | 1985 | 1990 |
|-------------------------|------|------|------|------|
| <b>SERVICES:</b>        |      |      |      |      |
| North Bay               | 40   | 58   | 74   | 101  |
| East Bay                | 103  | 136  | 172  | 226  |
| South Bay               | 137  | 200  | 250  | 303  |
| San Francisco           | 123  | 154  | 171  | 203  |
| Regional Total          | 402  | 547  | 667  | 832  |
| <b>RETAIL:</b>          |      |      |      |      |
| North Bay               | 39   | 56   | 68   | 84   |
| East Bay                | 100  | 128  | 149  | 168  |
| South Bay               | 108  | 139  | 161  | 170  |
| San Francisco           | 55   | 69   | 75   | 79   |
| Regional Total          | 301  | 391  | 453  | 501  |
| <b>MANUFACTURING:</b>   |      |      |      |      |
| North Bay               | 20   | 30   | 35   | 40   |
| East Bay                | 103  | 111  | 103  | 113  |
| South Bay               | 186  | 285  | 312  | 299  |
| San Francisco           | 47   | 51   | 43   | 40   |
| Regional Total          | 357  | 476  | 493  | 492  |
| <b>F.I.R.E.:</b>        |      |      |      |      |
| North Bay               | 10   | 17   | 21   | 24   |
| East Bay                | 28   | 37   | 47   | 58   |
| South Bay               | 30   | 43   | 51   | 55   |
| San Francisco           | 68   | 86   | 84   | 77   |
| Regional Total          | 136  | 183  | 203  | 213  |
| <b>CONSTRUCTION:</b>    |      |      |      |      |
| North Bay               | 11   | 15   | 20   | 29   |
| East Bay                | 29   | 37   | 45   | 52   |
| South Bay               | 27   | 40   | 47   | 50   |
| San Francisco           | 11   | 13   | 14   | 16   |
| Regional Total          | 78   | 105  | 126  | 147  |

From 1975 to 1990, San Francisco's largest employment groups are service and government industries, key sectors contributing to its role as a regional center. In 1990 retail became the third largest employment group for San Francisco, replacing F.I.R.E. which until 1985 was the third largest.

The South Bay has had for the past fifteen years a significant manufacturing and service employment.

For the same period the East Bay has shown significant increases in services and government employment.

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| CATEGORY/<br>Sub-region             | 1975        | 1980        | 1985        | 1990        |
|-------------------------------------|-------------|-------------|-------------|-------------|
| <b>WHOLESALE TRADE:</b>             |             |             |             |             |
| North Bay                           | 6           | 9           | 12          | 16          |
| East Bay                            | 33          | 38          | 45          | 52          |
| South Bay                           | 36          | 54          | 65          | 78          |
| San Francisco                       | 38          | 38          | 35          | 30          |
| <b>Regional Total</b>               | <b>113</b>  | <b>138</b>  | <b>158</b>  | <b>175</b>  |
| <b>GOVERNMENT:</b>                  |             |             |             |             |
| North Bay                           | 67          | 69          | 71          | 76          |
| East Bay                            | 150         | 154         | 154         | 168         |
| South Bay                           | 108         | 114         | 112         | 122         |
| San Francisco                       | 89          | 89          | 89          | 93          |
| <b>Regional Total</b>               | <b>412</b>  | <b>426</b>  | <b>426</b>  | <b>458</b>  |
| <b>TRANSPORTATION:</b>              |             |             |             |             |
| North Bay                           | 4           | 5           | 6           | 7           |
| East Bay                            | 24          | 27          | 28          | 32          |
| South Bay                           | 33          | 37          | 43          | 46          |
| San Francisco                       | 27          | 25          | 22          | 21          |
| <b>Regional Total</b>               | <b>87</b>   | <b>93</b>   | <b>98</b>   | <b>105</b>  |
| <b>COMMUNICATION AND UTILITIES:</b> |             |             |             |             |
| North Bay                           | 5           | 7           | 7           | 7           |
| East Bay                            | 15          | 16          | 23          | 30          |
| South Bay                           | 15          | 17          | 18          | 14          |
| San Francisco                       | 24          | 28          | 27          | 19          |
| <b>Regional Total</b>               | <b>59</b>   | <b>68</b>   | <b>75</b>   | <b>69</b>   |
| <b>MINING AND AGRICULTURE:</b>      |             |             |             |             |
| <b>Regional Total</b>               | <b>26</b>   | <b>28</b>   | <b>26</b>   | <b>27</b>   |
| <b>TOTAL JOBS:</b>                  |             |             |             |             |
| North Bay                           | 213         | 275         | 324         | 396         |
| East Bay                            | 589         | 690         | 771         | 904         |
| South Bay                           | 688         | 937         | 1061        | 1197        |
| San Francisco                       | 482         | 554         | 562         | 577         |
| <b>Regional Total</b>               | <b>1972</b> | <b>2456</b> | <b>2717</b> | <b>3074</b> |

Source: Department of City Planning  
Employment Development Department

BAY AREA EMPLOYMENT BY INDUSTRY AND SUB-REGIONS  
 Percentage Change  
 1975-90

Table 2.2.3

| CATEGORY/<br>Sub-region | 1975-80 | 1980-85 | 1985-90 | 1975-90 |
|-------------------------|---------|---------|---------|---------|
| <b>SERVICES:</b>        |         |         |         |         |
| North Bay               | 44      | 28      | 38      | 155     |
| East Bay                | 32      | 26      | 31      | 119     |
| South Bay               | 46      | 25      | 21      | 122     |
| San Francisco           | 25      | 12      | 18      | 65      |
| Regional Total          | 36      | 22      | 25      | 107     |
| <b>RETAIL:</b>          |         |         |         |         |
| North Bay               | 42      | 22      | 24      | 113     |
| East Bay                | 28      | 17      | 13      | 69      |
| South Bay               | 29      | 16      | 5       | 58      |
| San Francisco           | 25      | 9       | 6       | 45      |
| Regional Total          | 30      | 16      | 11      | 66      |
| <b>MANUFACTURING:</b>   |         |         |         |         |
| North Bay               | 49      | 17      | 13      | 96      |
| East Bay                | 7       | -7      | 10      | 10      |
| South Bay               | 53      | 10      | -4      | 60      |
| San Francisco           | 7       | -16     | -6      | -15     |
| Regional Total          | 33      | 4       | -0      | 38      |
| <b>F.I.R.E.:</b>        |         |         |         |         |
| North Bay               | 62      | 27      | 13      | 132     |
| East Bay                | 33      | 26      | 24      | 108     |
| South Bay               | 47      | 18      | 7       | 86      |
| San Francisco           | 25      | -2      | -9      | 12      |
| Regional Total          | 34      | 11      | 5       | 57      |
| <b>CONSTRUCTION:</b>    |         |         |         |         |
| North Bay               | 41      | 32      | 46      | 171     |
| East Bay                | 30      | 21      | 15      | 82      |
| South Bay               | 47      | 17      | 6       | 84      |
| San Francisco           | 17      | 8       | 12      | 42      |
| Regional Total          | 36      | 20      | 16      | 89      |

In terms of employment growth from 1975 to 1990, the North Bay has shown the greatest percentage increase in number of jobs in all sectors except communication and utilities, for the 1975-1990 period. During this same period San Francisco has shown the smallest increase in all sectors.

For the 1980-85 period, the East Bay has had a growth pattern opposite those of the other sub-regions. While the East Bay increased its rates of growth within wholesale trade and communication and utilities, the other three sub-regions showed a decline in the same industries. Similarly, while the East Bay showed a sharp decline in transportation for the same 1980-85 period, the North Bay and the South Bay showed a large percentage increase.

From 1975 to 1990, the service sector shows the highest regional percentage increase among all industry groups. This increase was most rapid in the late 70s (36 percent). The slowest, but still substantial, growth took place in the early 80s (22 percent). Slower employment growth for most industries occurred in the 1980-85 period.

(continue next page)

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| CATEGORY/<br>Sub-region             | 1975-80 | 1980-85 | 1985-90 | 1975-90 |
|-------------------------------------|---------|---------|---------|---------|
| <b>WHOLESALE TRADE:</b>             |         |         |         |         |
| North Bay                           | 42      | 39      | 28      | 152     |
| East Bay                            | 14      | 20      | 14      | 55      |
| South Bay                           | 50      | 21      | 20      | 118     |
| San Francisco                       | -1      | -6      | -14     | -21     |
| Regional Total                      | 22      | 15      | 11      | 55      |
| <b>GOVERNMENT:</b>                  |         |         |         |         |
| North Bay                           | 3       | 3       | 8       | 14      |
| East Bay                            | 3       | 0       | 9       | 12      |
| South Bay                           | 6       | -1      | 8       | 13      |
| San Francisco                       | 1       | -1      | 5       | 5       |
| Regional Total                      | 3       | -0      | 7       | 11      |
| <b>TRANSPORTATION:</b>              |         |         |         |         |
| North Bay                           | 21      | 32      | 19      | 90      |
| East Bay                            | 14      | 3       | 14      | 34      |
| South Bay                           | 13      | 17      | 7       | 40      |
| San Francisco                       | -7      | -13     | -5      | -24     |
| Regional Total                      | 7       | 5       | 7       | 21      |
| <b>COMMUNICATION AND UTILITIES:</b> |         |         |         |         |
| North Bay                           | 48      | -6      | 4       | 46      |
| East Bay                            | 9       | 40      | 30      | 98      |
| South Bay                           | 10      | 10      | -21     | -5      |
| San Francisco                       | 16      | -3      | -31     | -22     |
| Regional Total                      | 15      | 10      | -7      | 18      |
| <b>MINING AND AGRICULTURE:</b>      |         |         |         |         |
| Regional Total                      | 8       | -9      | 4       | 2       |
| <b>TOTAL JOBS:</b>                  |         |         |         |         |
| North Bay                           | 29      | 18      | 22      | 86      |
| East Bay                            | 17      | 12      | 17      | 53      |
| South Bay                           | 36      | 13      | 13      | 74      |
| San Francisco                       | 15      | 2       | 3       | 20      |
| Regional Total                      | 25      | 11      | 13      | 56      |

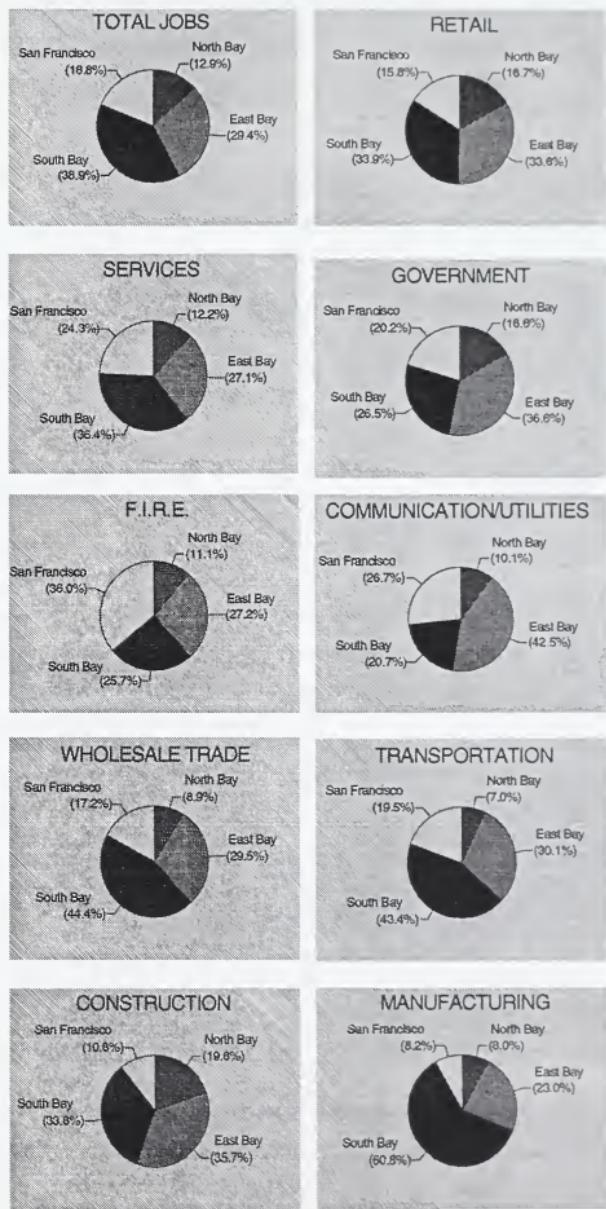
Source: Department of City Planning  
Employment Development Department

total manufacturing employment from 52 percent in 1975 to 61 percent in 1990 while San Francisco and the East Bay shares declined by 5 percent each. The most significant regional participation of the South Bay has been within manufacturing with 61 percent, wholesale trade with 44 percent, and transportation with 43 percent. The East Bay shows its greatest regional employment shares within communication and utilities with 43 percent, followed by government and construction with 37 and 36 percent. The North Bay major regional shares are in construction with 20 percent, retail and government, each one with 17 percent.

Although San Francisco still has the greatest concentration of F.I.R.E. jobs; its share of this sector has declined from 50 percent of the regional total of F.I.R.E. jobs in 1975 to 36 percent in 1990. A similar pattern is seen in the service sector where San Francisco has a significant participation, but where it has lost about 6 percent share, leading to an increase of 2 percent for each of the other three subregions. During the past fifteen years, the greatest losses in regional share for San Francisco besides the F.I.R.E. sector, have been within wholesale trade, communication and utilities, and transportation. The city's regional share in these sectors have declined by 16, 14, and 10 percent.

**Graph 2.2.1**

**BAY AREA -  
EMPLOYMENT BY SUB-  
REGIONS 1990**



BAY AREA EMPLOYMENT BY INDUSTRY GROUPS AND SUB-REGIONS  
 Percentage distribution by sub-regions  
 1975-90

Table 2.2.4

| CATEGORY/<br>Sub-region | 1975 | 1980 | 1985 | 1990 |
|-------------------------|------|------|------|------|
| <b>SERVICES:</b>        |      |      |      |      |
| North Bay               | 10   | 11   | 11   | 12   |
| East Bay                | 26   | 25   | 26   | 27   |
| South Bay               | 34   | 37   | 37   | 36   |
| San Francisco           | 30   | 28   | 26   | 24   |
| Regional Total          | 100  | 100  | 100  | 100  |
| <b>RETAIL:</b>          |      |      |      |      |
| North Bay               | 13   | 14   | 15   | 17   |
| East Bay                | 33   | 33   | 33   | 34   |
| South Bay               | 36   | 36   | 36   | 34   |
| San Francisco           | 18   | 18   | 17   | 16   |
| Regional Total          | 100  | 100  | 100  | 100  |
| <b>MANUFACTURING:</b>   |      |      |      |      |
| North Bay               | 6    | 6    | 7    | 8    |
| East Bay                | 29   | 23   | 21   | 23   |
| South Bay               | 52   | 60   | 63   | 61   |
| San Francisco           | 13   | 11   | 9    | 8    |
| Regional Total          | 100  | 100  | 100  | 100  |
| <b>F.I.R.E.:</b>        |      |      |      |      |
| North Bay               | 8    | 9    | 10   | 11   |
| East Bay                | 21   | 20   | 23   | 27   |
| South Bay               | 22   | 24   | 25   | 26   |
| San Francisco           | 50   | 47   | 41   | 36   |
| Regional Total          | 100  | 100  | 100  | 100  |
| <b>CONSTRUCTION:</b>    |      |      |      |      |
| North Bay               | 14   | 14   | 16   | 20   |
| East Bay                | 37   | 36   | 36   | 36   |
| South Bay               | 35   | 38   | 37   | 34   |
| San Francisco           | 14   | 12   | 11   | 11   |
| Regional Total          | 100  | 100  | 100  | 100  |

(continue next page)

(continue from previous page)

| CATEGORY/<br>Sub-region             | 1975 | 1980 | 1985 | 1990 |
|-------------------------------------|------|------|------|------|
| <b>WHOLESALE TRADE:</b>             |      |      |      |      |
| North Bay                           | 5    | 6    | 8    | 9    |
| East Bay                            | 29   | 27   | 29   | 29   |
| South Bay                           | 32   | 39   | 41   | 44   |
| San Francisco                       | 34   | 27   | 22   | 17   |
| Regional Total                      | 100  | 100  | 100  | 100  |
| <b>GOVERNMENT:</b>                  |      |      |      |      |
| North Bay                           | 16   | 16   | 17   | 17   |
| East Bay                            | 36   | 36   | 36   | 37   |
| South Bay                           | 26   | 27   | 26   | 27   |
| San Francisco                       | 21   | 21   | 21   | 20   |
| Regional Total                      | 100  | 100  | 100  | 100  |
| <b>TRANSPORTATION:</b>              |      |      |      |      |
| North Bay                           | 4    | 5    | 6    | 7    |
| East Bay                            | 27   | 29   | 28   | 30   |
| South Bay                           | 37   | 39   | 44   | 43   |
| San Francisco                       | 31   | 27   | 22   | 19   |
| Regional Total                      | 100  | 100  | 100  | 100  |
| <b>COMMUNICATION AND UTILITIES:</b> |      |      |      |      |
| North Bay                           | 8    | 11   | 9    | 10   |
| East Bay                            | 25   | 24   | 30   | 43   |
| South Bay                           | 26   | 25   | 24   | 21   |
| San Francisco                       | 41   | 41   | 36   | 27   |
| Regional Total                      | 100  | 100  | 100  | 100  |
| <b>TOTAL JOBS:</b>                  |      |      |      |      |
| North Bay                           | 11   | 11   | 12   | 13   |
| East Bay                            | 30   | 28   | 28   | 29   |
| South Bay                           | 35   | 38   | 39   | 39   |
| San Francisco                       | 24   | 23   | 21   | 19   |
| Regional Total                      | 100  | 100  | 100  | 100  |

Source: Department of City Planning  
Employment Development Department

## 3.0 SAN FRANCISCO ECONOMIC INDICATORS

### 3.1 EMPLOYMENT

The employment information included in this section focuses on the trends between 1976 and 1990 and on employment distribution by Land Use Activity, geography and establishment size. The source of data used to describe employment trends is the Employment Development Department (EDD), an agency that collects and presents county employment data by SIC codes to the two digit level. For the purpose of this Commerce and Industry Inventory, the original data by SIC codes are aggregated into the Land Use Activity classification. SIC codes are used only when necessary to go into more detail. A definition of the Land Use Activity classification and detail on the specific SIC codes grouped into each of the six activities are included in the Introduction, Data formats section, on page 2.

A second set of data, developed by the County Business Patterns (1987), US Department of Commerce, has been used to provide information about employment distribution by geography and by establishment size. The advantage of using these data is the availability of detailed employment groups to four SIC digits and geographical disaggregation by zip code. However, the disadvantage is that the data only include establishments and do not specify employment. Therefore, employment estimates are prepared based on establishment data by size class. The original data by zip code are classified according to the Commerce and Industry Districts which are defined in the Introduction, Data formats section on page 6.

#### 3.1.1 EMPLOYMENT BY LAND USE ACTIVITIES

San Francisco employment between 1976-1990 showed an increase of 180,570 employees, reaching a total of 581,560 employees in 1990. In absolute terms, there are three activities that generated most of the employment growth: Office with 86,000 more employees, Cultural/Institutional with growth of 50,000, and Retail with 30,000, representing together more than 90 percent of the total growth.

Office is the largest activity, accounting for more than one third of the total employment in 1990. From 1976 to 1990, Office activity increased from 27.9 percent to 34.1 percent of the total San Francisco employment. Industrial activity, starting in 1981, declined by almost 10,000 employees, and it went from 35 percent in 1976 to 23 percent of the total employment in 1990. Government employment also showed a decline starting in 1981. Other activities show smaller increases after 1981 than before.

**Table 3.1.1**

EMPLOYMENT BY LAND USE ACTIVITIES

Annual Average (Thousands of jobs)

1976-1990

| LANDUSE        | 1976          | 1978          | 1980          | 1982          | 1984          | 1986          | 1988          | 1990          |
|----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| OFFICE         | 112.01        | 138.52        | 159.05        | 167.56        | 184.00        | 187.87        | 191.23        | 198.37        |
| RETAIL         | 60.93         | 74.53         | 92.04         | 80.55         | 86.93         | 89.81         | 90.37         | 91.28         |
| INDUSTRIAL     | 140.35        | 155.19        | 165.42        | 162.56        | 151.02        | 143.98        | 136.22        | 130.69        |
| HOTEL          | 13.35         | 14.17         | 11.62         | 13.90         | 15.04         | 14.94         | 18.30         | 18.46         |
| CULTURAL/INST. | 54.25         | 83.60         | 80.77         | 89.17         | 88.91         | 93.23         | 97.55         | 104.72        |
| GOVERNMENT     | 20.11         | 42.24         | 42.94         | 37.88         | 36.26         | 36.96         | 37.66         | 38.04         |
| <b>TOTAL</b>   | <b>400.99</b> | <b>508.25</b> | <b>551.84</b> | <b>551.62</b> | <b>562.16</b> | <b>566.80</b> | <b>571.53</b> | <b>581.56</b> |

EMPLOYMENT BY LAND USE ACTIVITIES

Percentage distribution by Land Use Activities

1976-1990

| LANDUSE        | 1976         | 1978         | 1980         | 1982         | 1984         | 1986         | 1988         | 1990         |
|----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| OFFICE         | 27.9         | 27.3         | 28.8         | 30.4         | 32.7         | 33.1         | 33.5         | 34.1         |
| RETAIL         | 15.2         | 14.7         | 16.7         | 14.6         | 15.5         | 15.8         | 15.8         | 15.7         |
| INDUSTRIAL     | 35.0         | 30.5         | 30.0         | 29.5         | 26.9         | 25.4         | 23.8         | 22.5         |
| HOTEL          | 3.3          | 2.8          | 2.1          | 2.5          | 2.7          | 2.6          | 3.2          | 3.2          |
| CULTURAL/INST. | 13.5         | 16.4         | 14.6         | 16.2         | 15.8         | 16.4         | 17.1         | 18.0         |
| GOVERNMENT     | 5.0          | 8.3          | 7.8          | 6.9          | 6.5          | 6.5          | 6.6          | 6.5          |
| <b>TOTAL</b>   | <b>100.0</b> |

EMPLOYMENT BY LAND USE ACTIVITIES

Percentage change

1976-1990

| LANDUSE        | 76-77        | 78-79       | 80-81       | 82-83        | 84-85       | 86-87       | 88-89       | 76-90        |
|----------------|--------------|-------------|-------------|--------------|-------------|-------------|-------------|--------------|
| OFFICE         | 13.56        | 8.36        | 4.54        | 5.54         | 0.36        | -0.07       | 4.15        | 77.11        |
| RETAIL         | 15.00        | 3.89        | 2.87        | 1.53         | 1.41        | 0.87        | 2.61        | 49.80        |
| INDUSTRIAL     | 6.65         | 2.02        | 1.02        | -8.03        | -1.92       | -3.11       | -2.22       | -6.88        |
| HOTEL          | -0.37        | 1.92        | 6.54        | -2.55        | -2.36       | 8.18        | -6.99       | 38.29        |
| CULTURAL/INST. | 9.64         | -2.23       | 2.23        | 0.71         | 3.00        | 3.42        | 3.34        | 93.03        |
| GOVERNMENT     | 35.13        | 2.76        | -6.08       | -5.72        | 2.71        | 3.94        | 3.41        | 89.18        |
| <b>TOTAL</b>   | <b>11.45</b> | <b>3.38</b> | <b>2.16</b> | <b>-0.80</b> | <b>0.41</b> | <b>0.36</b> | <b>1.84</b> | <b>45.03</b> |

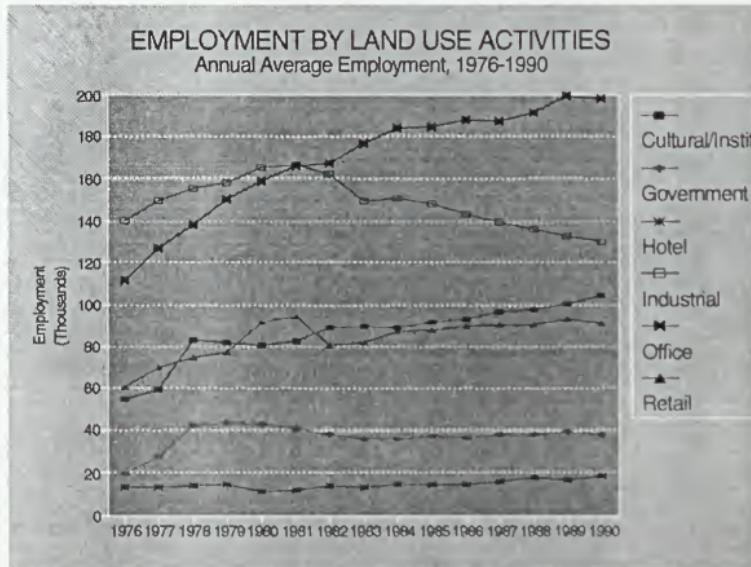
Source: Department of City Planning  
Employment Development Department

During the past fourteen years, Retail and Cultural/Institutional activities show an alternate pattern, where one activity grew while the other declined. In 1984 they had almost the same employment size. From 1984 to 1990 Cultural/Institutional employment Increased at a faster pace than Retail. By 1990, Cultural/Institutional activities had 104,720 employees, 13,000 more than Retail.

Government and Hotel activities are the smallest of all activities. In 1990, they represented 6.5 and 3.2 percent of the total employment respectively.

The San Francisco average rate of employment growth between 1976 and 1990 has been 2.8 percent per year. During the late 70s it was much higher; from 1976 to 1980 the average growth rate was 8.4 and during the 1980s, the average growth rate was 0.94 percent. Employment declined in 1982, 1983, and 1990.

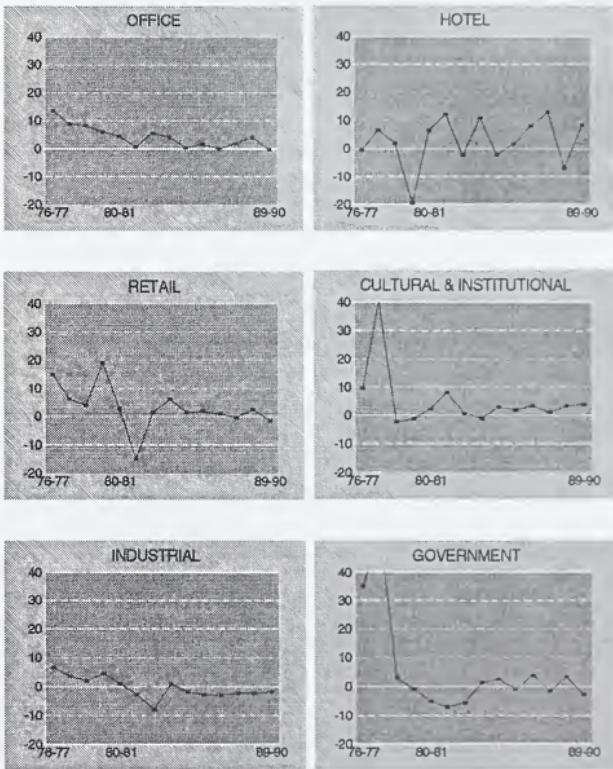
Graph 3.1.1



### Graph 3.1.2

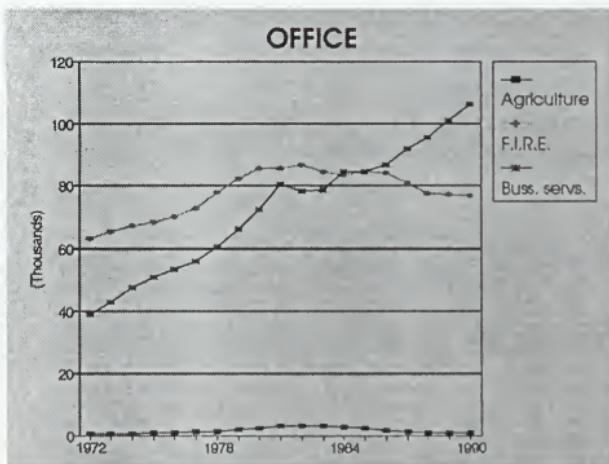
EMPLOYMENT BY LAND USE ACTIVITIES  
Annual percentage change  
1976-1990

Office and Industrial activities show less variations in their rates of change over time than other activities. (The greatest variation among percentage change indicators within Office activity is 4 percent and Industrial Activity is 9 percent.) Retail and Hotel activities have been volatile, with annual percentage change differences up to 25 percent. They show some alternate patterns especially during 1980-84 and 1988-90, where Retail increases while Hotel decreases and vice versa. After 1984, all activities indicate a smaller annual percentage change than in previous years, except for Hotel.



### 3.1.2 EMPLOYMENT BY INDUSTRY GROUPS: 1972-1990

The following information highlights some employment groups in Office, Retail, Government, and Industrial Activities. The data used come from the EDD annual report. While this is the same source as the previous table the formats are slightly different. The data in the previous table was provided in a form of special report by two SIC digits, including wage information from 1976 to 1990. The data used in these graphs are rounded to hundreds, combined into more than two SIC digits, and begin in 1972. Cultural/Institutional Activities have not been presented in this disaggregated format due to changes in composition of industry groups over this period, which does not allow comparisons over time.



**Graph 3.1.2**

In 1986, Business Services became the largest employment group within the Office activity. Business services is the industry group which has had an almost continuous employment growth for the past fourteen years. Personnel supply, services to buildings, and computer and data processing are the largest employment groups within business services. Engineering and architectural services have also shown a significant growth. The F.I.R.E. industry group has shown an overall decrease during the 1980s. However, while finance and insurance employment decreased, the real estate sector showed a small increase.

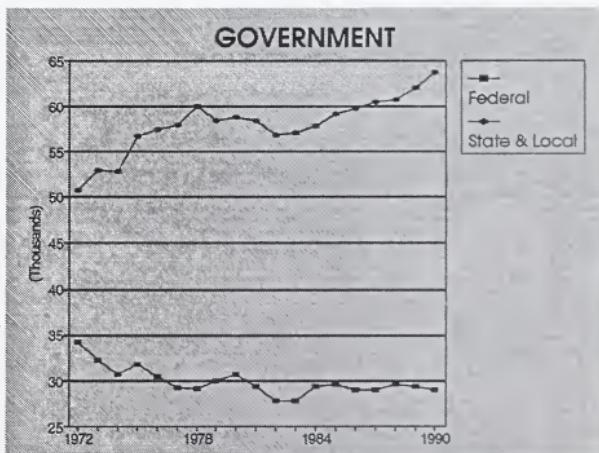
### Graph 3.1.3

Restaurants are the largest employment group within the Retail activity classification. Restaurants include all eating and drinking places. From 1972 to 1987, employment within this group shows significant and almost constant growth. Since 1987, employment has remained stable. "Other Retail" includes building materials, garden supplies, furniture, homefurnishing stores and some miscellaneous activities. They represent a major percentage of the entire Retail classification which has increased significantly. Food stores have also shown a significant increase.

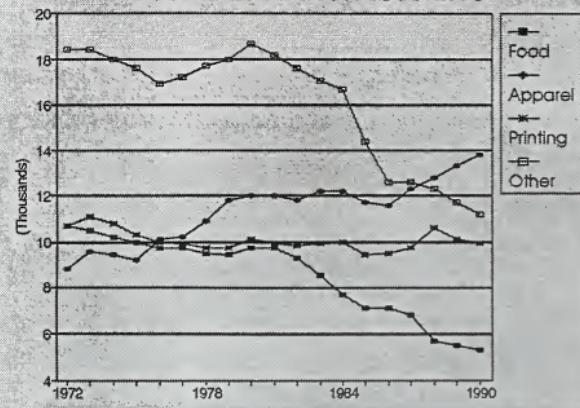


### Graph 3.1.4

There is a clear trend within Government activity in which State and Local employment grows while Federal employment decreases. During the early 1980s, these two sectors experienced similar trends, declining from 1980 to 1982 and then recovering.



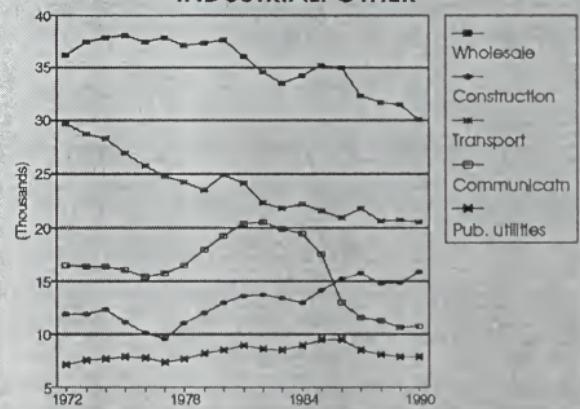
### INDUSTRIAL: MANUFACTURING



### Graph 3.1.5

This graph includes the employment groups within Industrial activity that are related to manufacturing. Among them, apparel manufacturing has become the largest group, showing an almost constant growth which has accelerated since 1986. Food manufacturing is showing a significant decline parallel to Other manufacturing which includes chemical goods, furnitures, metals, transportation, etc.

### INDUSTRIAL: OTHER



### Graph 3.1.6

Other employment groups within Industrial activity show the loss of employment in wholesale, transportation, and communication, which were the three largest groups in 1972. Construction and food manufacturing shown in the previous graph are the only two employment groups that have significantly increased within this eighteen year period.

### 3.1.3 EMPLOYMENT DISTRIBUTION BY COMMERCE AND INDUSTRY DISTRICTS

As indicated before, the following figures expressing employment distribution by Commerce and Industry Districts are based on estimates from establishment data prepared by County Business Patterns, US Department of Commerce. Because these data rely on establishments classified by employment size ranges, employment figures by Commerce and Industry Districts shall be only used as references, considering a margin of error. The C&I Districts are defined in the Introduction, Data Formats section, page 6.

Table 3.1.2 shows employment concentration within the Financial and South of Market districts, which together represent more than 55 percent of the total employment. There is even a greater percent of Office employment concentration in the Financial district (64 percent). To a lesser degree, Industrial activities are also concentrated in the Financial and South of Market districts. Hotel activity also shows a concentrated employment distribution of more than 68 percent between Civic Center and North Beach/Chinatown districts (which includes Fisherman's Wharf). Retail and Cultural/Institutional activities show a more decentralized distribution of employment than other activities, with less than 25 percent in any one district.

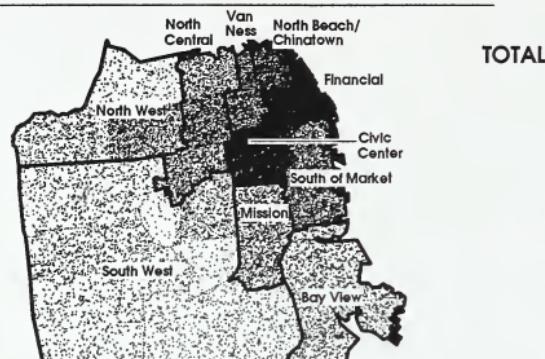
**Table 3.1.2**

EMPLOYMENT PERCENTAGE DISTRIBUTION BY C&I DISTRICT AND LAND USE ACTIVITY  
1987

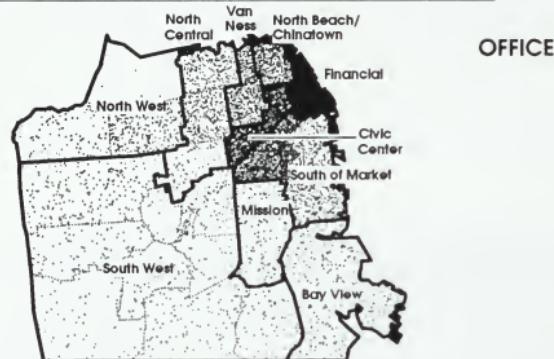
| DISTRICT          | TOTAL  | Office | Retail | Industrial | Hotel  | Cultural/Institutional |
|-------------------|--------|--------|--------|------------|--------|------------------------|
| Financial         | 40.01  | 64.38  | 18.31  | 37.14      | 10.69  | 15.99                  |
| Civic Center      | 7.26   | 6.27   | 11.43  | 1.84       | 36.72  | 6.64                   |
| N.Beach/Chinatown | 8.71   | 5.93   | 15.97  | 6.11       | 31.83  | 6.02                   |
| Van Ness          | 3.58   | 2.87   | 6.64   | 1.48       | 6.31   | 4.59                   |
| South of Market   | 15.03  | 10.54  | 12.70  | 29.83      | 8.87   | 6.43                   |
| Mission           | 2.86   | 0.61   | 3.98   | 3.93       | 0.06   | 6.14                   |
| North Central     | 6.81   | 2.83   | 8.65   | 1.10       | 3.01   | 24.68                  |
| North West        | 4.23   | 1.78   | 5.68   | 0.81       | 0.17   | 15.16                  |
| South West        | 6.30   | 3.30   | 12.12  | 3.23       | 0.55   | 13.47                  |
| Bay View          | 3.36   | 1.18   | 2.98   | 9.06       | 0.14   | 0.79                   |
| Other             | 1.83   | 0.32   | 1.53   | 5.44       | 1.65   | 0.08                   |
| Total             | 100.00 | 100.00 | 100.00 | 100.00     | 100.00 | 100.00                 |

Source: Department of City Planning  
County Business Patterns, 1987

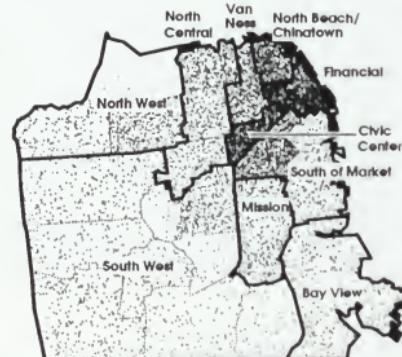
## MAP 3.1.1 EMPLOYMENT DISTRIBUTION BY C&I DISTRICTS



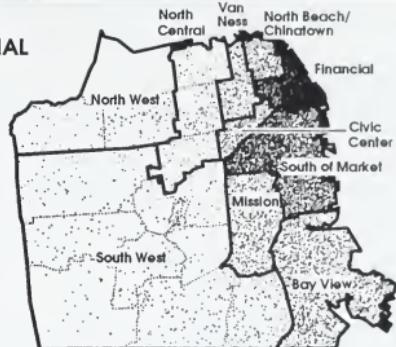
Maps presented have been generated as dot density maps to describe the relationship between number of employees and area. Each dot represents ten employees. However, the dots only indicate random distribution of employees within each zip code. They do not represent actual location of employment site.



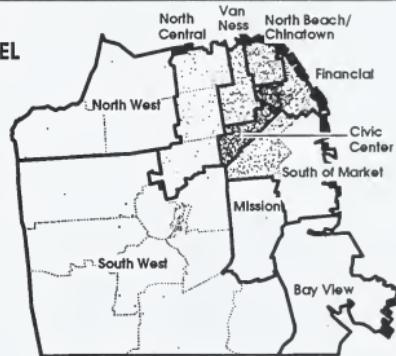
### RETAIL



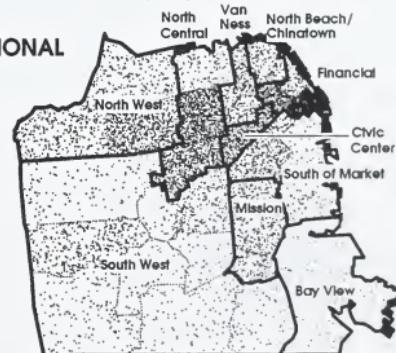
## INDUSTRIAL



## HOTEL



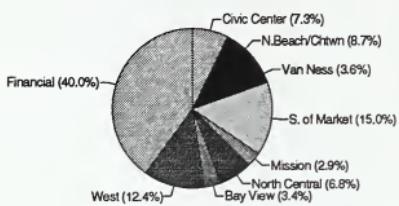
## CULTURAL/INSTITUTIONAL



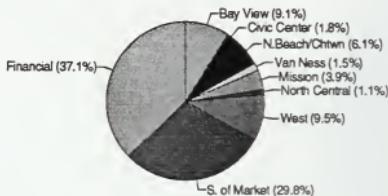
Source: Department of City Planning  
County Business Patterns

**Graph 3.1.7**  
**EMPLOYMENT DISTRIBUTION BY COMMERCE AND INDUSTRY DISTRICTS: 1987**

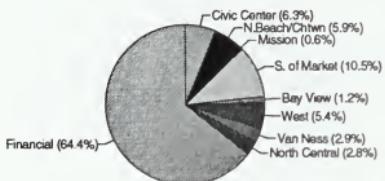
TOTAL



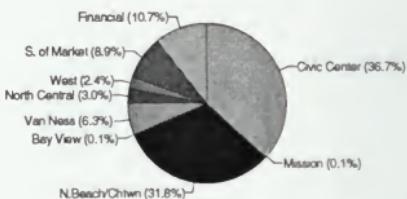
INDUSTRIAL



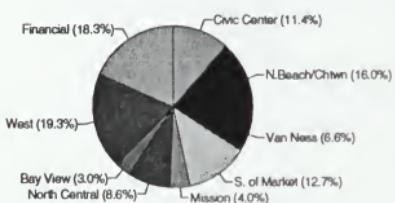
OFFICE



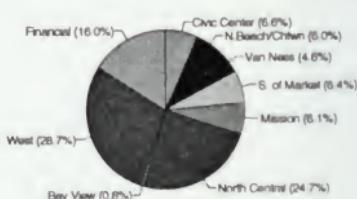
HOTEL



RETAIL



CULTURAL/INSTITUTIONAL



Source: Department of City Planning  
 County Business Patterns

### 3.1.3 EMPLOYMENT DISTRIBUTION BY ESTABLISHMENT SIZE

As explained in the previous section 3.1.2, employment data by establishments size are estimated from establishments data provided by County Business Patterns, 1987. Table 3.1.3 shows the percentage distribution of employment by establishment size within each C&I district. Based on the same data, Graph 3.1.8 shows the employment distribution by C&I districts within each size class. There are four size classes, based on the number of employees per establishment from one to over a thousand.

Districts with a high percentage of their total employment within the small establishments classification (1-9) are districts that have a major residential component such as South West, Mission, North West, Van Ness, and North Central. The Financial and South of Market districts, which have a very small residential component and a large percent of Office activity, are districts with the smallest percentage of small establishments within their total employment. Within the second classification, 10 to 99 employees per establishment, districts with significant Retail and Industrial activities tend to show higher employment percentages. Among all districts, the Financial district has the greatest percentage of its employment within the size class from 100 to 999 employees. Civic Center, North Central, and North West, districts that house many Cultural/Institutional activities, seem to have high employment allocation within large establishments.

EMPLOYMENT BY C&I DISTRICT AND ESTABLISHMENT SIZE CLASS  
Percentage distribution by size class  
1987

| District          | Establishment size class |       |         |       | TOTAL  |
|-------------------|--------------------------|-------|---------|-------|--------|
|                   | 1-9                      | 10-99 | 100-999 | 1000+ |        |
| Financial         | 9.43                     | 35.51 | 40.24   | 14.83 | 100.00 |
| Civic Center      | 12.64                    | 34.71 | 25.71   | 26.94 | 100.00 |
| N.Beach/Chinatown | 18.83                    | 46.29 | 27.93   | 6.96  | 100.00 |
| Van Ness          | 21.42                    | 45.86 | 32.72   | 0.00  | 100.00 |
| South of Market   | 12.45                    | 42.04 | 33.16   | 12.35 | 100.00 |
| Mission           | 24.86                    | 39.69 | 24.71   | 10.74 | 100.00 |
| North Central     | 20.18                    | 32.92 | 17.93   | 28.96 | 100.00 |
| North West        | 21.90                    | 30.70 | 24.63   | 22.77 | 100.00 |
| South West        | 31.14                    | 41.61 | 22.49   | 4.77  | 100.00 |
| Bay View          | 14.57                    | 56.71 | 28.72   | 0.00  | 100.00 |
| Other             | 2.53                     | 12.97 | 47.48   | 37.01 | 100.00 |
| TOTAL             | 14.54                    | 38.33 | 32.79   | 14.34 | 100.00 |

Source: Department of City Planning  
County Business Patterns

## Graph 3.1.8

### EMPLOYMENT DISTRIBUTION BY C&I DISTRICTS BY ESTABLISHMENT SIZE CLASS

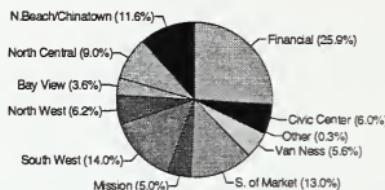
From the four size classes, the first one, representing the smallest establishments, shows the most even employment distribution among all C&I districts.

Employment in establishments of 10 to 99 employees are mainly represented within five districts: Financial, South of Market, North Beach/Chinatown, South West, and Civic Center districts.

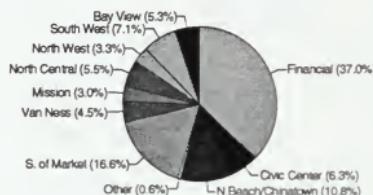
The third class shows employment concentration within the Financial and South of Market districts representing together almost 65 percent of total employment in this class.

Employment in large establishments is distributed among several districts. There are some districts that do not have large establishments or have very few.

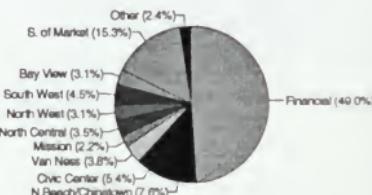
### EMPLOYMENT: ESTABLISHMENT SIZE 1-9



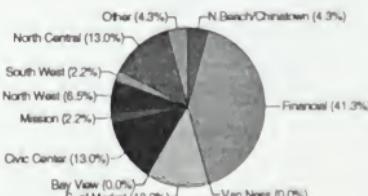
### EMPLOYMENT: ESTABLISHMENT SIZE 10-99



### EMPLOYMENT: ESTABLISHMENT SIZE 100-999



### EMPLOYMENT: ESTABLISHMENT SIZE 1000+



### 3.2 ESTABLISHMENTS

The description of the San Francisco business establishments is based on 1987 County Business Patterns (CBP) data, classified by zip code and Industry Group. As explained before, this data source is the only one available by two, three and four-digit SIC. The 1987 data are the last available information disaggregated by zip code.

The County Business Patterns defines establishment as "a single physical location at which business is conducted or where services or industrial operations are performed". This is different from a company or enterprise which may consist of several establishments. Establishments are classified within specific industry groups based on their predominant activity. The data reported by CBP excludes information that may disclose the operations of an individual employer.

While the San Francisco employment data, presented in the previous section, are described as a trend over time from 1976 to 1990, the establishment data focus on geographical distribution within the city at one point in time. The information is first classified by Land Use Activities and Commerce and Industry districts, which are the data formats defined for this inventory. These formats are described in detail within the introduction, Data formats section, page 3. In addition to the establishments classification by the six Land Use activities, each activity is disaggregated into small industry groups to the two SIC digit level. The establishment data presented by Commerce and Industry districts are disaggregated by zip code.

### **3.2.1 Establishments Distribution by Land Use Activity and C&I Districts.**

As indicated in table 3.2.1, in 1987, Office activity accounted for the largest number of establishments (39 percent) in the city. Retail activity with 27 percent and Industrial activity with 19 percent are the second and third largest activities in the city.

While Office establishments are highly concentrated in the Financial district (53 percent), Retail and Cultural/Institutional establishments are more dispersed throughout South of Market, North West, North Central, South West, and Financial Districts. Industrial and Hotel establishments tend to be concentrated in few Districts. Industrial establishments are concentrated in South of Market, Financial, and Bay View Districts; and Hotel establishments in Financial, North Central and Civic Center.

The Financial district contains more than thirty percent of the total number of establishments, followed by South of Market and South West with 13 and 12 percent respectively. Two C&I Districts in San Francisco are very specialized, having more than 50 percent of its establishments in one activity. Bay View District shows 64 percent of its establishments as Industrial and the Financial District 59 percent as Office. Other Districts, such as Mission and South West, show a more diverse set of activities with no single activity dominating.

**Table 3.2.1** ESTABLISHMENTS BY COMMERCE AND INDUSTRY DISTRICTS AND LAND USE ACTIVITIES  
Number of Establishments  
1987

|                    | OFFICE        | RETAIL       | INDUSTRY     | CULT/INST    | HOTEL      | TOTAL         |
|--------------------|---------------|--------------|--------------|--------------|------------|---------------|
| Financial          | 6,352         | 1,885        | 1,609        | 920          | 74         | 10,840        |
| Civic Center       | 711           | 595          | 194          | 366          | 50         | 1,916         |
| N. Beach/Chinatown | 515           | 651          | 224          | 144          | 20         | 1,554         |
| Van Ness           | 577           | 650          | 139          | 297          | 39         | 1,702         |
| South of Market    | 1,187         | 962          | 1,655        | 328          | 33         | 4,165         |
| Mission            | 242           | 509          | 338          | 308          | 4          | 1,401         |
| North Central      | 695           | 914          | 216          | 691          | 55         | 2,571         |
| North West         | 487           | 616          | 225          | 520          | 7          | 1,855         |
| South West         | 1,117         | 1,401        | 675          | 831          | 23         | 4,047         |
| Bay View           | 150           | 195          | 716          | 59           | 3          | 1,123         |
| Other              | 39            | 23           | 44           | 12           | 1          | 119           |
| <b>TOTAL</b>       | <b>12,072</b> | <b>8,401</b> | <b>6,035</b> | <b>4,476</b> | <b>309</b> | <b>31,293</b> |

Percentage distribution of establishments by Land Use Activities

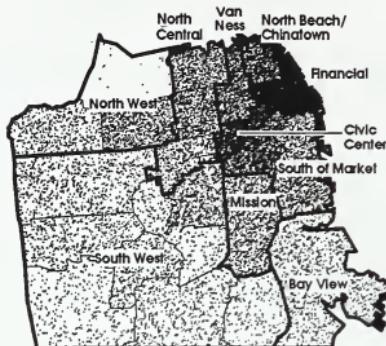
|                    | OFFICE       | RETAIL       | INDUSTRY     | CULT/INST    | HOTEL       | TOTAL         |
|--------------------|--------------|--------------|--------------|--------------|-------------|---------------|
| Financial          | 58.60        | 17.39        | 14.84        | 8.49         | 0.68        | 100.00        |
| Civic Center       | 37.11        | 31.05        | 10.13        | 19.10        | 2.61        | 100.00        |
| N. Beach/Chinatown | 33.14        | 41.89        | 14.41        | 9.27         | 1.29        | 100.00        |
| Van Ness           | 33.90        | 38.19        | 8.17         | 17.45        | 2.29        | 100.00        |
| South of Market    | 28.50        | 23.10        | 39.74        | 7.88         | 0.79        | 100.00        |
| Mission            | 17.27        | 36.33        | 24.13        | 21.98        | 0.29        | 100.00        |
| North Central      | 27.03        | 35.55        | 8.40         | 26.88        | 2.14        | 100.00        |
| North West         | 26.25        | 33.21        | 12.13        | 28.03        | 0.38        | 100.00        |
| South West         | 27.60        | 34.62        | 16.68        | 20.53        | 0.57        | 100.00        |
| Bay View           | 13.36        | 17.36        | 63.76        | 5.25         | 0.27        | 100.00        |
| Other              | 32.77        | 19.33        | 36.97        | 10.08        | 0.84        | 100.00        |
| <b>TOTAL</b>       | <b>38.58</b> | <b>26.85</b> | <b>19.29</b> | <b>14.30</b> | <b>0.99</b> | <b>100.00</b> |

Percentage distribution of establishments by Commerce and Industry Districts

|                    | OFFICE        | RETAIL        | INDUSTRY      | CULT/INST     | HOTEL         | TOTAL         |
|--------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Financial          | 52.62         | 22.44         | 26.66         | 20.55         | 23.95         | 34.64         |
| Civic Center       | 5.89          | 7.08          | 3.21          | 8.18          | 16.18         | 6.12          |
| N. Beach/Chinatown | 4.27          | 7.75          | 3.71          | 3.22          | 6.47          | 4.97          |
| Van Ness           | 4.78          | 7.74          | 2.30          | 6.64          | 12.62         | 5.44          |
| South of Market    | 9.83          | 11.45         | 27.42         | 7.33          | 10.68         | 13.31         |
| Mission            | 2.00          | 6.06          | 5.60          | 6.88          | 1.29          | 4.48          |
| North Central      | 5.76          | 10.88         | 3.58          | 15.44         | 17.80         | 8.22          |
| North West         | 4.03          | 7.33          | 3.73          | 11.62         | 2.27          | 5.93          |
| South West         | 9.25          | 16.68         | 11.18         | 18.57         | 7.44          | 12.93         |
| Bay View           | 1.24          | 2.32          | 11.86         | 1.32          | 0.97          | 3.59          |
| Other              | 0.32          | 0.27          | 0.73          | 0.27          | 0.32          | 0.38          |
| <b>TOTAL</b>       | <b>100.00</b> | <b>100.00</b> | <b>100.00</b> | <b>100.00</b> | <b>100.00</b> | <b>100.00</b> |

Source: City Planning Department  
County Business Patterns, 1987

## MAPS 3.2.1 ESTABLISHMENTS DISTRIBUTION BY C&I DISTRICTS

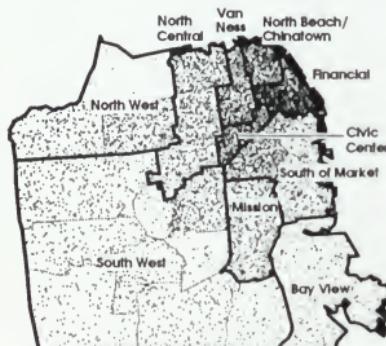


**TOTAL**

Maps presented have been generated as dot density maps to describe the relationship between number of establishments and area. However, the dots only indicate random distribution of establishments within each zip code. They do not represent actual location of establishments.

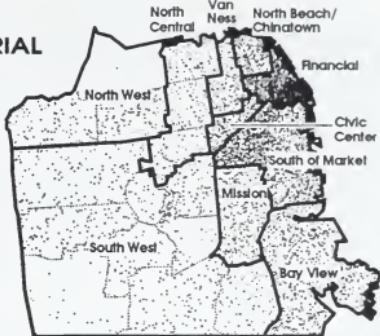


**OFFICE**

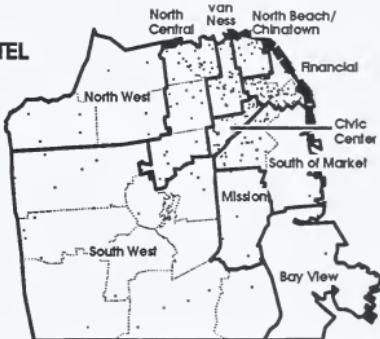


**RETAIL**

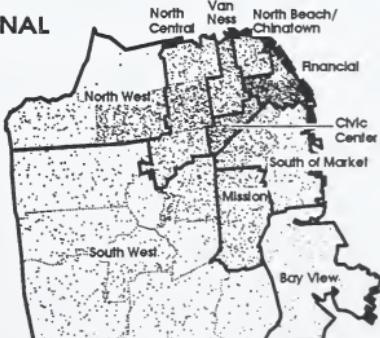
### INDUSTRIAL



### HOTEL



### CULTURAL/INSTITUTIONAL



Source:

Department of City Planning  
County Business Patterns

### **3.2.2 Establishments Distribution by SIC Codes and Commerce and Industry Districts**

In addition to the establishment data presented by Land Use activities, Tables 3.2.2 to 3.2.5 show a detailed breakdown of industry groups (two-digit SIC) included within each of those activities. Hotel and Government activities are not included in this series of tables because Hotel represents only one industry group (70) and Government data are not reported by the CBP establishments data.

The largest industry groups in Office activity are F.I.R.E., Business services, legal services, and architecture and engineering. They together form 80 percent of the total Office activity. The Financial district contains the majority of all Legal services (59 percent) and F.I.R.E. (69 percent) establishments. Business, architecture and engineering services have a significant representation, besides the Financial district, in South of Market and South West districts.

Table 3.2.3 shows Eating and drinking establishments as the largest industry group within Retail activity. They are mainly located in North Beach/Chinatown, Civic Center, North West, and Van Ness. Personal services establishments also have a significant participation, specially in the South West, Financial, and North Central Districts. Food stores are the third largest category of retail establishments. North Beach/Chinatown, South West, and Mission districts show a high percentage of their establishments within food stores. Apparel stores are the most concentrated type of store within the Financial district. There is also a large number of establishments clustered into the miscellaneous category.

As indicated in Table 3.2.4, construction and wholesale establishments represent 62 percent of all Industrial establishments. Printing and publishing, transportation, and apparel manufacturing industries account for more than 400 establishments each. Most Industrial establishments are located in South of Market, which contains more than 27 percent of total establishments. Bay View district, which has limited participation in other activities, shows the third largest concentration of Industrial establishments. They are mainly related to food manufacturing and transportation. South West district contains the largest number of construction establishments (418), citywide, which represents 62 percent of the total establishments within this district.

More than 50 percent of all Cultural/Institutional establishments are within Health services. They are mainly located in the Financial, North Central, South West, and North West districts. Membership organizations and social services establishments are the second and third largest groups with 18 and 12 percent of all Cultural/Institutional establishments. Educational establishments represent 7 percent. The three remaining groups, motion picture, amusement and recreation, and museums, make up the remaining 10 percent of the total.

OFFICE ESTABLISHMENTS BY C&I DISTRICTS AND MAIN INDUSTRY GROUPS (SIC)  
1987

Table 3.2.2

|                    | TOTAL         | 0-14       | 47         | 60-7         | 73           | 81           | 89           | 00           |
|--------------------|---------------|------------|------------|--------------|--------------|--------------|--------------|--------------|
| Financial          | 6,352         | 66         | 262        | 2,581        | 1,311        | 1,132        | 625          | 375          |
| Civic Center       | 711           | 2          | 54         | 214          | 140          | 148          | 76           | 77           |
| N. Beach/Chinatown | 515           | 7          | 26         | 143          | 145          | 59           | 68           | 67           |
| Van Ness           | 577           | 4          | 20         | 223          | 119          | 76           | 72           | 63           |
| South of Market    | 1,187         | 17         | 54         | 300          | 428          | 63           | 187          | 138          |
| Mission            | 242           | 9          | 6          | 55           | 63           | 24           | 28           | 57           |
| North Central      | 695           | 16         | 26         | 213          | 196          | 64           | 73           | 107          |
| North West         | 487           | 10         | 14         | 195          | 122          | 18           | 61           | 67           |
| South West         | 1,117         | 37         | 41         | 422          | 254          | 59           | 124          | 180          |
| Bay View           | 150           | 4          | 8          | 24           | 68           | 2            | 17           | 27           |
| Other              | 39            | 0          | 8          | 11           | 14           | 1            | 1            | 4            |
| <b>TOTAL</b>       | <b>12,072</b> | <b>172</b> | <b>519</b> | <b>4,381</b> | <b>2,860</b> | <b>1,646</b> | <b>1,332</b> | <b>1,162</b> |

Percentage distribution of establishments by C&I Districts

|                    | TOTAL      | 0-14       | 47         | 60-7       | 73         | 81         | 89         | 00         |
|--------------------|------------|------------|------------|------------|------------|------------|------------|------------|
| Financial          | 53         | 38         | 50         | 59         | 46         | 69         | 47         | 32         |
| Civic Center       | 6          | 1          | 10         | 5          | 5          | 9          | 6          | 7          |
| N. Beach/Chinatown | 4          | 4          | 5          | 3          | 5          | 4          | 5          | 6          |
| Van Ness           | 5          | 2          | 4          | 5          | 4          | 5          | 5          | 5          |
| South of Market    | 10         | 10         | 10         | 7          | 15         | 4          | 14         | 12         |
| Mission            | 2          | 5          | 1          | 1          | 2          | 1          | 2          | 5          |
| North Central      | 6          | 9          | 5          | 5          | 7          | 4          | 5          | 9          |
| North West         | 4          | 6          | 3          | 4          | 4          | 1          | 5          | 6          |
| South West         | 9          | 22         | 8          | 10         | 9          | 4          | 9          | 15         |
| Bay View           | 1          | 2          | 2          | 1          | 2          | 0          | 1          | 2          |
| Other              | 0          | 0          | 2          | 0          | 0          | 0          | 0          | 0          |
| <b>TOTAL</b>       | <b>100</b> |

Percentage distribution of establishments by Industry Groups (SIC)

|                    | TOTAL      | 0-14     | 47       | 60-7      | 73        | 81        | 89        | 00        |
|--------------------|------------|----------|----------|-----------|-----------|-----------|-----------|-----------|
| Financial          | 100        | 1        | 4        | 41        | 21        | 19        | 10        | 4         |
| Civic Center       | 100        | 0        | 8        | 30        | 20        | 21        | 11        | 11        |
| N. Beach/Chinatown | 100        | 1        | 5        | 28        | 28        | 11        | 13        | 13        |
| Van Ness           | 100        | 1        | 3        | 39        | 21        | 13        | 12        | 11        |
| South of Market    | 100        | 1        | 5        | 25        | 36        | 5         | 16        | 12        |
| Mission            | 100        | 4        | 2        | 23        | 26        | 10        | 12        | 24        |
| North Central      | 100        | 2        | 4        | 31        | 28        | 9         | 11        | 15        |
| North West         | 100        | 2        | 3        | 40        | 25        | 4         | 13        | 14        |
| South West         | 100        | 3        | 4        | 38        | 23        | 5         | 11        | 16        |
| Bay View           | 100        | 3        | 5        | 16        | 45        | 1         | 11        | 18        |
| Other              | 100        | 0        | 21       | 28        | 36        | 3         | 3         | 10        |
| <b>TOTAL</b>       | <b>100</b> | <b>1</b> | <b>4</b> | <b>36</b> | <b>24</b> | <b>14</b> | <b>11</b> | <b>10</b> |

Source: Department of City Planning  
County Business Patterns, 1987

INDUSTRY GROUPS, SIC

- 0-14: Agriculture, forestry, fishing and mining.
- 47: Transportation services
- 60-7: Finance, Insurance, and Real Estate
- 73: Business Services
- 81: Legal Services
- 89: Engineering and Architectural Services
- 00: Other

**Table 3.2.3** RETAIL ESTABLISHMENTS BY C&J DISTRICTS AND MAIN INDUSTRY GROUPS (SIC)  
1987

| INDUSTRY GROUPS,<br>SIC   | TOTAL              | 53    | 54  | 55  | 56  | 57  | 58    | 59    | 72  | 75  | 76  |
|---|--------------------|-------|-----|-----|-----|-----|-------|-------|-----|-----|-----|
|   | Financial          | 1,885 | 15  | 145 | 38  | 265 | 83    | 550   | 447 | 189 | 126 |
|   | Civic Center       | 595   | 3   | 54  | 10  | 46  | 18    | 215   | 128 | 59  | 53  |
|   | N. Beach/Chinatown | 651   | 7   | 114 | 8   | 47  | 18    | 240   | 151 | 35  | 27  |
|   | Van Ness           | 650   | 4   | 75  | 21  | 46  | 37    | 208   | 113 | 64  | 74  |
|   | South of Market    | 962   | 13  | 63  | 45  | 62  | 66    | 281   | 174 | 59  | 145 |
|   | Mission            | 509   | 6   | 79  | 20  | 43  | 28    | 152   | 81  | 46  | 37  |
|   | North Central      | 914   | 7   | 114 | 29  | 90  | 43    | 268   | 215 | 106 | 39  |
|   | North West         | 616   | 4   | 86  | 31  | 48  | 43    | 200   | 106 | 66  | 23  |
|   | South West         | 1,401 | 15  | 233 | 90  | 83  | 69    | 403   | 226 | 202 | 47  |
| 53: General merchandise stores  | 195                | 4     | 19  | 17  | 4   | 17  | 31    | 44    | 12  | 26  | 21  |
| 54: Food stores   | 23                 | 1     | 2   | 0   | 0   | 1   | 6     | 6     | 3   | 3   | 1   |
| TOTAL   | 8,401              | 79    | 984 | 309 | 734 | 423 | 2,554 | 1,691 | 841 | 600 | 186 |
| Percentage distribution of establishments by C&J Districts              |                    |       |     |     |     |     |       |       |     |     |     |
| INDUSTRY GROUPS,<br>SIC   | TOTAL              | 53    | 54  | 55  | 56  | 57  | 58    | 59    | 72  | 75  | 76  |
|   | Financial          | 22    | 19  | 15  | 12  | 36  | 20    | 22    | 26  | 22  | 21  |
|   | Civic Center       | 7     | 4   | 5   | 3   | 6   | 4     | 8     | 8   | 7   | 9   |
|   | N. Beach/Chinatown | 8     | 9   | 12  | 3   | 6   | 4     | 9     | 9   | 4   | 5   |
|   | Van Ness           | 8     | 5   | 8   | 7   | 6   | 9     | 8     | 7   | 8   | 12  |
|   | South of Market    | 11    | 16  | 6   | 15  | 8   | 16    | 11    | 10  | 7   | 24  |
|   | Mission            | 6     | 8   | 8   | 6   | 6   | 7     | 6     | 5   | 5   | 9   |
|   | North Central      | 11    | 9   | 12  | 9   | 12  | 10    | 10    | 13  | 13  | 7   |
|   | North West         | 7     | 5   | 9   | 10  | 7   | 10    | 8     | 6   | 8   | 5   |
|   | South West         | 17    | 19  | 24  | 29  | 11  | 16    | 16    | 13  | 24  | 8   |
| 55: Auto dealers, service stations                                      | Bay View           | 2     | 5   | 2   | 6   | 1   | 4     | 1     | 3   | 1   | 4   |
| 56: Apparel and accessory stores  | Other              | 0     | 1   | 0   | 0   | 0   | 0     | 0     | 0   | 0   | 1   |
| TOTAL   | 100                | 100   | 100 | 100 | 100 | 100 | 100   | 100   | 100 | 100 | 100 |
| Percentage distribution of establishments by Main Industry Groups (SIC) |                    |       |     |     |     |     |       |       |     |     |     |
| INDUSTRY GROUPS,<br>SIC   | TOTAL              | 53    | 54  | 55  | 56  | 57  | 58    | 59    | 72  | 75  | 76  |
|   | Financial          | 100   | 1   | 8   | 2   | 14  | 4     | 29    | 24  | 10  | 7   |
|   | Civic Center       | 100   | 1   | 9   | 2   | 8   | 3     | 36    | 22  | 10  | 9   |
|   | N. Beach/Chinatown | 100   | 1   | 18  | 1   | 7   | 3     | 37    | 23  | 5   | 4   |
|   | Van Ness           | 100   | 1   | 12  | 3   | 7   | 6     | 32    | 17  | 10  | 11  |
|   | South of Market    | 100   | 1   | 7   | 5   | 6   | 7     | 29    | 18  | 6   | 15  |
|   | Mission            | 100   | 1   | 16  | 4   | 8   | 6     | 30    | 16  | 9   | 7   |
|   | North Central      | 100   | 1   | 12  | 3   | 10  | 5     | 29    | 24  | 12  | 4   |
|   | North West         | 100   | 1   | 14  | 5   | 8   | 7     | 32    | 17  | 11  | 4   |
|   | South West         | 100   | 1   | 17  | 6   | 6   | 5     | 29    | 16  | 14  | 3   |
| 57: Furniture and homefurnishing stores                                 | Bay View           | 100   | 2   | 10  | 9   | 2   | 9     | 16    | 23  | 6   | 13  |
| 58: Eating and drinking places  | Other              | 100   | 4   | 9   | 0   | 0   | 4     | 26    | 26  | 13  | 13  |
| TOTAL   | 100                | 1     | 12  | 4   | 9   | 5   | 30    | 20    | 10  | 7   | 2   |

Source: City Planning Department  
County Business Patterns, 1987

INDUSTRIAL ESTABLISHMENTS BY C&I DISTRICTS AND MAIN INDUSTRY GROUPS  
1987

Table 3.2.4

| District           | TOTAL | 15-7  | 20  | 23  | 27  | 39+ | 40-7 | 48  | 49 | 50    | 51    |
|--------------------|-------|-------|-----|-----|-----|-----|------|-----|----|-------|-------|
| Financial          | 1,609 | 265   | 18  | 67  | 150 | 277 | 122  | 51  | 41 | 338   | 280   |
| Civic Center       | 194   | 22    | 4   | 19  | 9   | 20  | 16   | 6   | 5  | 62    | 31    |
| N. Beach/Chinatown | 224   | 31    | 10  | 81  | 16  | 17  | 6    | 4   | 0  | 20    | 39    |
| Van Ness           | 139   | 38    | 4   | 20  | 7   | 9   | 5    | 4   | 1  | 29    | 22    |
| South of Market    | 1,655 | 217   | 25  | 161 | 166 | 172 | 107  | 22  | 12 | 448   | 325   |
| Mission            | 338   | 127   | 6   | 36  | 18  | 44  | 13   | 9   | 0  | 45    | 40    |
| North Central      | 216   | 89    | 1   | 4   | 25  | 11  | 19   | 3   | 1  | 27    | 36    |
| North West         | 225   | 131   | 4   | 6   | 11  | 10  | 10   | 1   | 0  | 27    | 25    |
| South West         | 675   | 418   | 6   | 13  | 30  | 37  | 26   | 6   | 2  | 73    | 64    |
| Bay View           | 716   | 159   | 26  | 4   | 25  | 122 | 80   | 3   | 1  | 157   | 139   |
| Other              | 44    | 2     | 0   | 0   | 4   | 0   | 31   | 0   | 3  | 1     | 3     |
| TOTAL              | 6,035 | 1,499 | 104 | 411 | 461 | 719 | 435  | 109 | 66 | 1,227 | 1,004 |

INDUSTRY GROUPS, SIC

- 15-7: Construction
- 20: Food and kindred products
- 23: Apparel & other textile products
- 27: Printing and publishing
- 39+: Other manufacturing
- 40-7: Transportation
- 48: Communications
- 49: Electric, gas, & sanitary servcs.
- 50: Wholesale, durable goods
- 51: Wholesale, nondurable goods

Percentage distribution of establishments by C&I Districts

| District           | TOTAL | 15-7 | 20  | 23  | 27  | 39+ | 40-7 | 48  | 49  | 50  | 51  |
|--------------------|-------|------|-----|-----|-----|-----|------|-----|-----|-----|-----|
| Financial          | 27    | 18   | 17  | 16  | 33  | 39  | 28   | 47  | 62  | 28  | 28  |
| Civic Center       | 3     | 1    | 4   | 5   | 2   | 3   | 4    | 6   | 8   | 5   | 3   |
| N. Beach/Chinatown | 4     | 2    | 10  | 20  | 3   | 2   | 1    | 4   | 0   | 2   | 4   |
| Van Ness           | 2     | 3    | 4   | 5   | 2   | 1   | 1    | 4   | 2   | 2   | 2   |
| South of Market    | 27    | 14   | 24  | 39  | 36  | 24  | 25   | 20  | 18  | 37  | 32  |
| Mission            | 6     | 8    | 6   | 9   | 4   | 6   | 3    | 8   | 0   | 4   | 4   |
| North Central      | 4     | 6    | 1   | 1   | 5   | 2   | 4    | 3   | 2   | 2   | 4   |
| North West         | 4     | 9    | 4   | 1   | 2   | 1   | 2    | 1   | 0   | 2   | 2   |
| South West         | 11    | 28   | 6   | 3   | 7   | 5   | 6    | 6   | 3   | 6   | 6   |
| Bay View           | 12    | 11   | 25  | 1   | 5   | 17  | 18   | 3   | 2   | 13  | 14  |
| Other              | 1     | 0    | 0   | 0   | 1   | 0   | 7    | 0   | 5   | 0   | 0   |
| TOTAL              | 100   | 100  | 100 | 100 | 100 | 100 | 100  | 100 | 100 | 100 | 100 |

Percentage distribution of establishments by Main Industry Groups (SIC)

| District           | TOTAL | 15-7 | 20 | 23 | 27 | 39+ | 40-7 | 48 | 49 | 50 | 51 |
|--------------------|-------|------|----|----|----|-----|------|----|----|----|----|
| Financial          | 100   | 16   | 1  | 4  | 9  | 17  | 8    | 3  | 3  | 21 | 17 |
| Civic Center       | 100   | 11   | 2  | 10 | 5  | 10  | 8    | 3  | 3  | 32 | 16 |
| N. Beach/Chinatown | 100   | 14   | 4  | 36 | 7  | 8   | 3    | 2  | 0  | 9  | 17 |
| Van Ness           | 100   | 27   | 3  | 14 | 5  | 6   | 4    | 3  | 1  | 21 | 16 |
| South of Market    | 100   | 13   | 2  | 10 | 10 | 10  | 6    | 1  | 1  | 27 | 20 |
| Mission            | 100   | 38   | 2  | 11 | 5  | 13  | 4    | 3  | 0  | 13 | 12 |
| North Central      | 100   | 41   | 0  | 2  | 12 | 5   | 9    | 1  | 0  | 13 | 17 |
| North West         | 100   | 58   | 2  | 3  | 5  | 4   | 4    | 0  | 0  | 12 | 11 |
| South West         | 100   | 62   | 1  | 2  | 4  | 5   | 4    | 1  | 0  | 11 | 9  |
| Bay View           | 100   | 22   | 4  | 1  | 3  | 17  | 11   | 0  | 0  | 22 | 19 |
| Other              | 100   | 5    | 0  | 0  | 9  | 0   | 70   | 0  | 7  | 2  | 7  |
| TOTAL              | 100   | 25   | 2  | 7  | 8  | 12  | 7    | 2  | 1  | 20 | 17 |

Source: City Planning Department  
County Business Patterns, 1987

**Table 3.2.5** CULTURAL/INSTITUTIONAL ESTABLISHMENTS BY C&J DISTRICTS AND MAIN INDUSTRY GROUPS (SIC)  
1987

INDUSTRY GROUPS, SIC

78: Motion Pictures  
 79: Amusement and recreation services  
 80: Health services  
 82: Educational services  
 83: Social services  
 84: Museums, botanical, zoological gardens  
 86: Membership organizations

| District          | TOTAL        | 78         | 79         | 80           | 82         | 83         | 84        | 86         |
|-------------------|--------------|------------|------------|--------------|------------|------------|-----------|------------|
| Financial         | 920          | 28         | 48         | 475          | 70         | 90         | 4         | 205        |
| Civic Center      | 366          | 24         | 28         | 155          | 24         | 50         | 1         | 84         |
| N.Beach/Chinatown | 144          | 17         | 14         | 70           | 11         | 11         | 1         | 20         |
| Van Ness          | 297          | 15         | 9          | 174          | 14         | 29         | 1         | 55         |
| South of Market   | 328          | 58         | 33         | 36           | 31         | 68         | 5         | 97         |
| Mission           | 308          | 7          | 22         | 164          | 19         | 51         | 2         | 43         |
| North Central     | 691          | 13         | 34         | 441          | 42         | 85         | 8         | 68         |
| North West        | 520          | 10         | 15         | 366          | 25         | 53         | 5         | 46         |
| South West        | 831          | 15         | 43         | 416          | 73         | 106        | 2         | 176        |
| Bay View          | 59           | 4          | 4          | 11           | 4          | 14         | 0         | 22         |
| Other             | 12           | 0          | 2          | 4            | 2          | 1          | 0         | 3          |
| <b>TOTAL</b>      | <b>4,476</b> | <b>191</b> | <b>252</b> | <b>2,312</b> | <b>315</b> | <b>558</b> | <b>29</b> | <b>819</b> |

Distribution of establishments by C&J Districts

| District          | TOTAL      | 78         | 79         | 80         | 82         | 83         | 84         | 86         |
|-------------------|------------|------------|------------|------------|------------|------------|------------|------------|
| Financial         | 21         | 15         | 19         | 21         | 22         | 16         | 14         | 25         |
| Civic Center      | 8          | 13         | 11         | 7          | 8          | 9          | 3          | 10         |
| N.Beach/Chinatown | 3          | 9          | 6          | 3          | 3          | 2          | 3          | 2          |
| Van Ness          | 7          | 8          | 4          | 8          | 4          | 5          | 3          | 7          |
| South of Market   | 7          | 30         | 13         | 2          | 10         | 12         | 17         | 12         |
| Mission           | 7          | 4          | 9          | 7          | 6          | 9          | 7          | 5          |
| North Central     | 15         | 7          | 13         | 19         | 13         | 15         | 28         | 8          |
| North West        | 12         | 5          | 6          | 16         | 8          | 10         | 17         | 6          |
| South West        | 19         | 8          | 17         | 18         | 23         | 19         | 7          | 21         |
| Bay View          | 1          | 2          | 2          | 0          | 1          | 3          | 0          | 3          |
| Other             | 0          | 0          | 1          | 0          | 1          | 0          | 0          | 0          |
| <b>TOTAL</b>      | <b>100</b> |

Percentage distribution of establishments by Main Industry Groups (SIC)

| District          | TOTAL      | 78       | 79       | 80        | 82       | 83        | 84       | 86        |
|-------------------|------------|----------|----------|-----------|----------|-----------|----------|-----------|
| Financial         | 100        | 3        | 5        | 52        | 8        | 10        | 0        | 22        |
| Civic Center      | 100        | 7        | 8        | 42        | 7        | 14        | 0        | 23        |
| N.Beach/Chinatown | 100        | 12       | 10       | 49        | 8        | 8         | 1        | 14        |
| Van Ness          | 100        | 5        | 3        | 59        | 5        | 10        | 0        | 19        |
| South of Market   | 100        | 18       | 10       | 11        | 9        | 21        | 2        | 30        |
| Mission           | 100        | 2        | 7        | 53        | 6        | 17        | 1        | 14        |
| North Central     | 100        | 2        | 5        | 64        | 6        | 12        | 1        | 10        |
| North West        | 100        | 2        | 3        | 70        | 5        | 10        | 1        | 9         |
| South West        | 100        | 2        | 5        | 50        | 9        | 13        | 0        | 21        |
| Bay View          | 100        | 7        | 7        | 19        | 7        | 24        | 0        | 37        |
| Other             | 100        | 0        | 17       | 33        | 17       | 8         | 0        | 25        |
| <b>TOTAL</b>      | <b>100</b> | <b>4</b> | <b>6</b> | <b>52</b> | <b>7</b> | <b>12</b> | <b>1</b> | <b>18</b> |

Source: City Planning Department  
 County Business Patterns, 1987

### 3.2.3 Establishments by Zip Code and Land Use Activity

The County Business Patterns provides more detailed information about establishments by zip codes for 1987. The following tables, 3.2.6 and 3.2.7 show the distribution of establishments by zip code and Land Use Activities.

The largest concentration of establishments is within zip code 94105 with almost 4,000 establishments. This is also the zip code that contains the largest number of Office and Industrial establishments citywide. Within the Financial district, zip code 94105 concentrates around 40 percent of all establishments.

ESTABLISHMENTS BY ZIP CODE AND LAND USE ACTIVITY  
1987

Table 3.2.6

|                        | Zip Code | TOTAL  | Office | Retail | Industrial | Hotel | Cultural/<br>Institutional |
|------------------------|----------|--------|--------|--------|------------|-------|----------------------------|
| Financial              | 94104    | 2,204  | 1,800  | 173    | 154        | 10    | 67                         |
|                        | 94105    | 3,998  | 1,966  | 678    | 943        | 30    | 376                        |
|                        | 94111    | 2,611  | 1,849  | 365    | 288        | 4     | 104                        |
| Civic Center           | 94102    | 1,919  | 711    | 598    | 193        | 50    | 366                        |
| North Beach/ Chinatown | 94108    | 2,051  | 737    | 693    | 217        | 30    | 373                        |
| Van Ness               | 94109    | 1,708  | 577    | 656    | 139        | 39    | 297                        |
| South of Market        | 94103    | 2,431  | 674    | 607    | 894        | 31    | 220                        |
|                        | 94107    | 1,749  | 513    | 370    | 749        | 2     | 108                        |
| Mission                | 94110    | 1,411  | 242    | 519    | 335        | 4     | 308                        |
| North Central          | 94115    | 1,057  | 258    | 310    | 77         | 11    | 401                        |
|                        | 94117    | 570    | 111    | 226    | 64         | 13    | 156                        |
|                        | 94123    | 958    | 326    | 392    | 75         | 31    | 134                        |
| North West             | 94118    | 1,275  | 328    | 414    | 120        | 3     | 409                        |
|                        | 94121    | 574    | 154    | 210    | 103        | 4     | 103                        |
|                        | 94129    | 19     | 5      | 5      | 1          |       | 8                          |
| South West             | 94112    | 647    | 175    | 225    | 125        | 4     | 115                        |
|                        | 94114    | 735    | 195    | 313    | 82         | 3     | 142                        |
|                        | 94116    | 521    | 145    | 151    | 129        | 4     | 92                         |
|                        | 94122    | 830    | 226    | 330    | 132        | 8     | 133                        |
|                        | 94127    | 443    | 138    | 141    | 43         |       | 120                        |
|                        | 94131    | 273    | 106    | 58     | 54         | 2     | 53                         |
|                        | 94132    | 371    | 72     | 135    | 27         | 1     | 136                        |
|                        | 94134    | 249    | 60     | 70     | 76         | 1     | 40                         |
| Bay View               | 94124    | 1,134  | 150    | 206    | 707        | 3     | 59                         |
| Others                 | 94128    | 80     | 22     | 16     | 38         | 1     | 3                          |
|                        | 94130    | 9      | 2      | 3      | 2          |       | 2                          |
|                        | 94119    | 30     | 15     | 4      | 4          |       | 7                          |
| TOTAL                  |          | 31,418 | 12,072 | 8,526  | 5,995      | 309   | 4,476                      |

Source: Department of City Planning  
County Business Patterns, 1987

**Table 3.2.7**ESTABLISHMENT PERCENTAGE BY ZIP CODE AND LAND USE ACTIVITY  
1987

|               | Zip<br>Code | TOTAL | Office | Retail | Industrial | Hotel | Cultural/<br>Institutional |
|---------------|-------------|-------|--------|--------|------------|-------|----------------------------|
| Financial     | 94104       | 7.0   | 14.9   | 2.0    | 2.6        | 3.2   | 1.5                        |
|               | 94105       | 12.7  | 16.3   | 8.0    | 15.7       | 9.7   | 8.4                        |
|               | 94111       | 8.3   | 15.3   | 4.3    | 4.8        | 1.3   | 2.3                        |
| Civic Center  | 94102       | 6.1   | 5.9    | 7.0    | 3.2        | 16.2  | 8.2                        |
| North Beach/  | 94108       | 6.5   | 6.1    | 8.1    | 3.6        | 9.7   | 8.3                        |
| Chinatown     | 94133       | 5.0   | 4.3    | 7.7    | 3.7        | 6.5   | 3.2                        |
| Van Ness      | 94109       | 5.4   | 4.8    | 7.7    | 2.3        | 12.6  | 6.6                        |
| South of      | 94103       | 7.7   | 5.6    | 7.1    | 14.9       | 10.0  | 4.9                        |
| Market        | 94107       | 5.6   | 4.2    | 4.3    | 12.5       | 0.6   | 2.4                        |
| Mission       | 94110       | 4.5   | 2.0    | 6.1    | 5.6        | 1.3   | 6.9                        |
| North Central | 94115       | 3.4   | 2.1    | 3.6    | 1.3        | 3.6   | 9.0                        |
|               | 94117       | 1.8   | 0.9    | 2.7    | 1.1        | 4.2   | 3.5                        |
|               | 94123       | 3.0   | 2.7    | 4.6    | 1.3        | 10.0  | 3.0                        |
| North West    | 94118       | 4.1   | 2.7    | 4.9    | 2.0        | 1.0   | 9.1                        |
|               | 94121       | 1.8   | 1.3    | 2.5    | 1.7        | 1.3   | 2.3                        |
|               | 94129       | 0.1   | 0.0    | 0.1    | 0.0        | 0.0   | 0.2                        |
| South West    | 94112       | 2.1   | 1.4    | 2.6    | 2.1        | 1.3   | 2.6                        |
|               | 94114       | 2.3   | 1.6    | 3.7    | 1.4        | 1.0   | 3.2                        |
|               | 94116       | 1.7   | 1.2    | 1.8    | 2.2        | 1.3   | 2.1                        |
|               | 94122       | 2.6   | 1.9    | 3.9    | 2.2        | 2.6   | 3.0                        |
|               | 94127       | 1.4   | 1.1    | 1.7    | 0.7        | 0.0   | 2.7                        |
|               | 94131       | 0.9   | 0.9    | 0.7    | 0.9        | 0.6   | 1.2                        |
|               | 94132       | 1.2   | 0.6    | 1.6    | 0.5        | 0.3   | 3.0                        |
|               | 94134       | 0.8   | 0.5    | 0.8    | 1.3        | 0.3   | 0.9                        |
| Bay View      | 94124       | 3.6   | 1.2    | 2.4    | 11.8       | 1.0   | 1.3                        |
| Others        | 94128       | 0.3   | 0.2    | 0.2    | 0.6        | 0.3   | 0.1                        |
|               | 94130       | 0.0   | 0.0    | 0.0    | 0.0        | 0.0   | 0.0                        |
|               | 94119       | 0.1   | 0.1    | 0.0    | 0.1        | 0.0   | 0.2                        |
| <b>TOTAL</b>  |             | 100.0 | 100.0  | 100.0  | 100.0      | 100.0 | 100.0                      |

Source: Department of City Planning  
County Business Patterns, 1987

This subdivision of C&I districts into zip code areas highlights uneven distribution of establishments and activities in some districts. North West shows more than 60 percent of all its establishments in 94118, one of three zip code areas. North Central only shows less than 25 percent in 94117, one of its three zip code areas. Within South of Market, zip code 94103 shows almost 60 percent of establishments while 94107 only 40 percent.

The Financial district shows a relatively even distribution of Office establishments among its three zip code areas, but all the other establishments are concentrated in 94105. More than 50 percent of Retail establishments and more than 70 percent of Industrial, Hotel, and Cultural/Institutional establishments are concentrated in 94105.

### 3.2.4 ESTABLISHMENTS BY SIZE CLASS

The establishment data by size class and C&I District are also provided by County Business Patterns, 1987. Size classes are determined by the number of paid employees in the mid-March period per establishment. The size group 1 to 4 include establishments that did not report any paid employees in the mid-March pay period but paid wages to at least one employee at some time during the year.

The number of smallest establishments, 1 to 4 employees, account for more than 50 percent of the total. Establishments with 5 to 9, 10 to 19, and 20 to 49 employees constitute about 39 percent of the total number of establishments. And the last five classifications which range from 50 to more than a thousand employees represent about 5 percent of the total number of establishments.

The largest establishments are concentrated in the Financial district with 46 percent of the total. Civic Center, North Central and South of Market each has 13 percent of the total largest establishments. Other districts have few establishments of this size. The smallest establishments, which are less concentrated than large establishments, are spread among the Financial district (31 percent), South West district (16 percent) and South of Market (12 percent).

All districts have their largest number of establishments within the smallest classification. However, while Bay View shows only 39 percent of its total number of establishments in the smallest classification, North and South West show 66 percent each. Bay View district also shows a greater proportional share for establishments of 5 to 9, 10 to 19, and 20 to 49 employees, than any other district. Bay View, Mission and South of Market Districts show a significant proportion of their establishments with 5 to 9 employees (23, 22, and 20 percent). The Financial District shows a greater proportional share of establishments with 50 to 999 employees than other districts. South West, North West, and North Central Districts show the greatest share of the smallest establishments.

City-wide, there are 360 establishments with 1 to 4 employees for each establishment with more than 1,000 employees. Among all districts, Civic Center shows the greatest percentage (0.31) of its total establishments allocated in establishments with more than 1,000 employees. This results in the lowest ratio small/large establishment of 177, which means that for each large establishment in Civic Center there are 177 small establishments. North West and Financial Districts have the second and third lowest ratio small/large establishments of 265 and 270.

**Table 3.2.8** ESTABLISHMENTS BY C&I DISTRICTS AND SIZE CLASS  
1987

| DISTRICT           | Number of employees by establishment |       |       |       |       |         |         |         |      |        | 1000 | TOTAL |
|--------------------|--------------------------------------|-------|-------|-------|-------|---------|---------|---------|------|--------|------|-------|
|                    | 1-4                                  | 5-9   | 10-19 | 20-49 | 50-99 | 100-249 | 250-499 | 500-999 | 1000 |        |      |       |
| Financial          | 5,391                                | 1,989 | 1,463 | 1,170 | 444   | 281     | 73      | 32      | 21   | 10,864 |      |       |
| Civic Center       | 1,069                                | 342   | 235   | 162   | 66    | 29      | 6       | 4       | 6    | 1,919  |      |       |
| N. Beach/Chinatown | 848                                  | 281   | 216   | 151   | 38    | 18      | 8       | 1       | 0    | 1,561  |      |       |
| Van Ness           | 1,013                                | 306   | 209   | 118   | 39    | 13      | 7       | 3       | 0    | 1,708  |      |       |
| South of Market    | 2,006                                | 839   | 586   | 478   | 158   | 76      | 20      | 11      | 6    | 4,180  |      |       |
| Mission            | 816                                  | 304   | 178   | 77    | 19    | 13      | 1       | 2       | 1    | 1,411  |      |       |
| North Central      | 1,591                                | 507   | 253   | 161   | 41    | 19      | 5       | 2       | 6    | 2,585  |      |       |
| North West         | 1,237                                | 300   | 201   | 92    | 16    | 12      | 4       | 3       | 3    | 1,868  |      |       |
| South West         | 2,702                                | 713   | 389   | 177   | 53    | 25      | 7       | 2       | 1    | 4,069  |      |       |
| Bay View           | 447                                  | 267   | 185   | 162   | 45    | 23      | 5       | 0       | 0    | 1,134  |      |       |
| Others             | 51                                   | 17    | 13    | 16    | 7     | 5       | 6       | 2       | 2    | 119    |      |       |
|                    | 17,171                               | 5,865 | 3,928 | 2,764 | 926   | 514     | 142     | 62      | 46   | 31,418 |      |       |

Percentage distribution by Size Class

| DISTRICT           | 1-4 | 5-9 | 10-19 | 20-49 | 50-99 | 100-249 | 250-499 | 500-999 | 1000 | TOTAL |
|--------------------|-----|-----|-------|-------|-------|---------|---------|---------|------|-------|
|                    |     |     |       |       |       |         |         |         |      |       |
| Financial          | 31  | 34  | 37    | 42    | 48    | 55      | 51      | 52      | 46   | 35    |
| Civic Center       | 6   | 6   | 6     | 6     | 7     | 6       | 4       | 6       | 13   | 6     |
| N. Beach/Chinatown | 5   | 5   | 6     | 5     | 4     | 4       | 6       | 2       | 0    | 5     |
| Van Ness           | 6   | 5   | 5     | 4     | 4     | 3       | 5       | 5       | 0    | 5     |
| South of Market    | 12  | 14  | 15    | 17    | 17    | 15      | 14      | 18      | 13   | 13    |
| Mission            | 5   | 5   | 5     | 3     | 2     | 3       | 1       | 3       | 2    | 4     |
| North Central      | 9   | 9   | 6     | 6     | 4     | 4       | 4       | 3       | 13   | 8     |
| North West         | 7   | 5   | 5     | 3     | 2     | 2       | 3       | 5       | 7    | 6     |
| South West         | 16  | 12  | 10    | 6     | 6     | 5       | 5       | 3       | 2    | 13    |
| Bay View           | 3   | 5   | 5     | 6     | 5     | 4       | 4       | 0       | 0    | 4     |
| Others             | 0   | 0   | 0     | 1     | 1     | 1       | 4       | 3       | 4    | 0     |
|                    | 100 | 100 | 100   | 100   | 100   | 100     | 100     | 100     | 100  | 100   |

Percentage distribution by C&I District

| DISTRICT           | 1-4 | 5-9 | 10-19 | 20-49 | 50-99 | 100-249 | 250-499 | 500-999 | 1000 | TOTAL |
|--------------------|-----|-----|-------|-------|-------|---------|---------|---------|------|-------|
|                    |     |     |       |       |       |         |         |         |      |       |
| Financial          | 50  | 18  | 13    | 11    | 4     | 3       | 1       | 0       | 0    | 0     |
| Civic Center       | 56  | 18  | 12    | 8     | 3     | 2       | 0       | 0       | 0    | 100   |
| N. Beach/Chinatown | 54  | 18  | 14    | 10    | 2     | 1       | 1       | 0       | 0    | 100   |
| Van Ness           | 59  | 18  | 12    | 7     | 2     | 1       | 0       | 0       | 0    | 100   |
| South of Market    | 48  | 20  | 14    | 11    | 4     | 2       | 0       | 0       | 0    | 100   |
| Mission            | 58  | 22  | 13    | 5     | 1     | 1       | 0       | 0       | 0    | 100   |
| North Central      | 62  | 20  | 10    | 6     | 2     | 1       | 0       | 0       | 0    | 100   |
| North West         | 66  | 16  | 11    | 5     | 1     | 1       | 0       | 0       | 0    | 100   |
| South West         | 66  | 18  | 10    | 4     | 1     | 1       | 0       | 0       | 0    | 100   |
| Bay View           | 39  | 24  | 16    | 14    | 4     | 2       | 0       | 0       | 0    | 100   |
| Others             | 43  | 14  | 11    | 13    | 6     | 4       | 5       | 2       | 2    | 100   |
|                    | 55  | 19  | 13    | 9     | 3     | 2       | 0       | 0       | 0    | 100   |

Source: Department of City Planning  
County Business Patterns, 1987

### **3.3 WAGES AND PROPRIETORS' INCOME, BUSINESS REVENUES, CITY REVENUES AND EXPENDITURES**

This section presents data about major trends in money transactions in San Francisco that result from and influence economic activities. The three sections focus on different sectors of the City's economy. First, we examine the income that individuals receive from their work in San Francisco, either from wages and salaries or from self-employment. This section complements the earlier discussion of employment by describing the earnings from employment. The second section describes the aggregate revenues that businesses receive, and breaks that data down geographically and by type of business. The third section describes the revenues and expenditures of the City and County of San Francisco and how they have changed over time.

#### **3.3.1 WAGES AND PROPRIETORS' INCOME**

This section presents two sets of data which describe the earnings of those who are employed in San Francisco. Annual wage data, for the 1976-90 period, come from the California Employment Development Department. This data set is presented by Land Use Activities. It includes the wages and salaries of those employed in businesses and other establishments.

Personal Income data, for the 1981-89 period, come from the US Department of Commerce, Bureau of Economic Analysis. They also include wages and salaries, but in addition include other labor income and proprietors' income, by industry groups, using the Standard Industrial Classification (SIC) system.

##### **3.3.1.1 California Employment Development Department Data.**

The first data set describes wages of payroll employees by industry groups. It includes all full-time and part-time employees, including employees on paid vacation or sick leave who work in or receive compensation from establishments for any part of the pay period which includes the 12th of the month. Self-employed people, unpaid volunteers, and family workers as well as private household workers, and persons in labor-management disputes are excluded.

**Table 3.3.1**

UNADJUSTED WAGES BY LAND USE ACTIVITIES  
(Annual wages in \$1,000)  
1976-1990

| YEAR | TOTAL      | OFFICE    | RETAIL    | INDUSTRIAL | HOTEL   | CULTURAL/<br>INSTITUTIONAL | GOVERNMENT |
|------|------------|-----------|-----------|------------|---------|----------------------------|------------|
| 1976 | 5,285,479  | 1,420,355 | 522,625   | 2,345,822  | 88,499  | 571,366                    | 336,813    |
| 1977 | 6,317,056  | 1,756,506 | 641,370   | 2,656,428  | 92,610  | 682,315                    | 487,828    |
| 1978 | 7,514,420  | 2,030,687 | 716,664   | 2,922,407  | 107,990 | 994,109                    | 742,564    |
| 1979 | 8,379,314  | 2,444,437 | 793,809   | 3,185,295  | 124,473 | 1,051,505                  | 779,796    |
| 1980 | 9,610,709  | 2,820,438 | 1,035,153 | 3,660,147  | 126,136 | 1,118,971                  | 849,864    |
| 1981 | 10,797,733 | 3,308,953 | 1,137,176 | 4,077,457  | 139,762 | 1,278,434                  | 855,949    |
| 1982 | 11,721,719 | 3,737,774 | 1,000,375 | 4,419,711  | 171,686 | 1,496,342                  | 895,810    |
| 1983 | 12,428,668 | 4,504,059 | 1,065,764 | 4,164,500  | 187,065 | 1,635,471                  | 871,810    |
| 1984 | 13,309,502 | 4,813,339 | 1,163,844 | 4,404,903  | 219,380 | 1,743,516                  | 964,520    |
| 1985 | 14,197,427 | 5,217,563 | 1,255,971 | 4,541,877  | 228,774 | 1,911,961                  | 1,041,281  |
| 1986 | 15,073,744 | 5,781,345 | 1,344,814 | 4,579,183  | 247,127 | 2,060,516                  | 1,060,758  |
| 1987 | 15,711,380 | 6,143,772 | 1,398,147 | 4,521,971  | 281,649 | 2,239,643                  | 1,126,198  |
| 1988 | 16,544,183 | 6,645,046 | 1,457,764 | 4,620,840  | 313,179 | 2,346,332                  | 1,161,021  |
| 1989 | 17,254,229 | 6,970,125 | 1,516,339 | 4,655,862  | 313,100 | 2,531,733                  | 1,267,071  |
| 1990 | 18,204,899 | 7,371,403 | 1,566,210 | 4,742,450  | 357,257 | 2,808,349                  | 1,359,130  |

**Table 3.3.2**

ADJUSTED WAGES BY LAND USE ACTIVITIES  
Annual wages adjusted by Inflation (CPI 1982-84=100) in \$1,000  
1976-1990

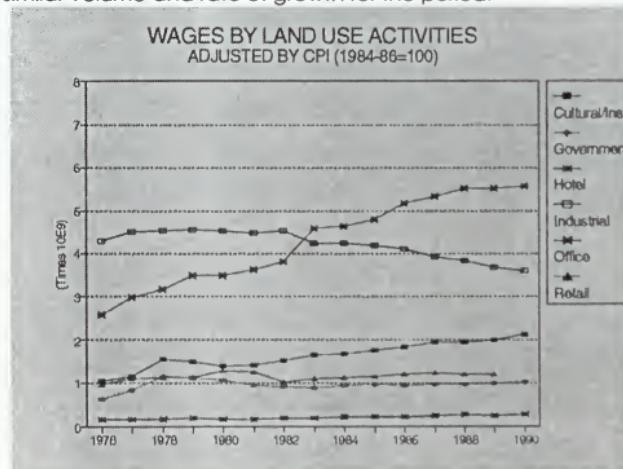
| YEAR | TOTAL      | OFFICE    | RETAIL    | INDUSTRIAL | HOTEL   | CULTURAL/<br>INSTITUTIONAL | GOVERNMENT |
|------|------------|-----------|-----------|------------|---------|----------------------------|------------|
| 1976 | 9,680,365  | 2,601,383 | 957,189   | 4,296,376  | 162,086 | 1,046,458                  | 616,873    |
| 1977 | 10,743,292 | 2,987,255 | 1,090,765 | 4,517,735  | 157,499 | 1,160,399                  | 829,639    |
| 1978 | 11,686,501 | 3,158,144 | 1,114,563 | 4,544,957  | 167,947 | 1,546,048                  | 1,154,843  |
| 1979 | 12,004,748 | 3,502,058 | 1,137,262 | 4,563,460  | 178,328 | 1,506,454                  | 1,117,186  |
| 1980 | 11,953,618 | 3,508,007 | 1,287,504 | 4,552,422  | 156,885 | 1,391,755                  | 1,057,045  |
| 1981 | 11,891,776 | 3,644,222 | 1,252,397 | 4,490,592  | 153,923 | 1,407,967                  | 942,675    |
| 1982 | 12,009,958 | 3,829,686 | 1,024,975 | 4,528,392  | 175,908 | 1,533,158                  | 917,838    |
| 1983 | 12,630,761 | 4,577,295 | 1,083,093 | 4,232,216  | 190,106 | 1,662,064                  | 885,986    |
| 1984 | 12,797,599 | 4,628,211 | 1,119,081 | 4,235,484  | 210,942 | 1,676,458                  | 927,423    |
| 1985 | 13,097,258 | 4,813,250 | 1,158,645 | 4,189,924  | 211,046 | 1,763,801                  | 960,592    |
| 1986 | 13,506,939 | 5,180,417 | 1,205,031 | 4,103,211  | 221,440 | 1,846,341                  | 950,500    |
| 1987 | 13,614,714 | 5,323,892 | 1,211,566 | 3,918,519  | 244,063 | 1,940,765                  | 975,908    |
| 1988 | 13,729,613 | 5,514,561 | 1,209,763 | 3,834,722  | 259,900 | 1,947,164                  | 963,503    |
| 1989 | 13,650,498 | 5,514,340 | 1,199,635 | 3,683,435  | 247,706 | 2,002,953                  | 1,002,429  |
| 1990 | 13,781,150 | 5,580,169 | 1,185,624 | 3,590,046  | 270,520 | 2,125,927                  | 1,028,864  |

Source : Department of City Planning  
Employment Development Department

These data have been grouped by Land Use Activities (See Introduction, Data formats) as Office, Retail, Industrial, Hotel, Cultural/Institutional, and Government. This is the same Land Use Activity classification used to organize employment and establishment data. Annual wage data are presented in four tables: in current dollars, dollars adjusted for inflation, in percentage distribution by Land Use Activities, and percentage change over time.

In 1990, the total annual wage for the city in current dollars reached \$18.2 billion, which is twice the 1980 amount and three times the 1976 amount, in unadjusted dollars. There was an overall increase in all Activities for the 1976-1990 period that went from 100 to 400 percent, also in terms of unadjusted dollars.

The second table, showing dollar figures adjusted by inflation, describes changes over time more meaningfully than the previous table. Wages were adjusted based on the Consumer Price Index (CPI) from US Department of Labor, Bureau of Labor Statistics. This CPI corresponds to the designated reference date 1982-84 for the San Francisco-Oakland-San Jose area for all urban consumers. Adjusted figures show a total wage increase of 42% from 1976 to 1990. While there is a significant increase within Office Activity, the Industrial Activity, which had the highest total wages in 1976 shows a steady decline in adjusted wages from 1982 to 1990. In spite of this decline, Industrial Activity still represented the second largest wage group in 1990. Cultural/Institutional Activities are the third largest wage group with a similar pace of growth as the Office Activity. Retail and Government Activities show a similar volume and rate of growth for the period.



Graph 3.3.1

Source:

Department of City Planning  
Employment Development Department

The Consumer Price Index (CPI) is a measure of the average change in prices over time in a fixed market basket of goods and services. The CPI is based on prices of food, clothing, shelter, and fuels, transportation fares, charges for doctors and dentists services, drugs, and the other goods that people buy for day-to-day living. The indexes used for adjustment measure price change from the designated reference date 1982-84, which equals 100.

**Table 3.3.3**

WAGES BY LAND USE ACTIVITIES  
 Percentage distribution of annual wages by Land Use Activities  
 1976-1990

| YEAR | TOTAL | OFFICE | RETAIL | INDUSTRIAL | HOTEL | CULTURAL/<br>INSTITUTNL | GOVT |
|------|-------|--------|--------|------------|-------|-------------------------|------|
| 1976 | 100   | 27     | 10     | 44         | 2     | 11                      | 6    |
| 1977 | 100   | 28     | 10     | 42         | 1     | 11                      | 8    |
| 1978 | 100   | 27     | 10     | 39         | 1     | 13                      | 10   |
| 1979 | 100   | 29     | 9      | 38         | 1     | 13                      | 9    |
| 1980 | 100   | 29     | 11     | 38         | 1     | 12                      | 9    |
| 1981 | 100   | 31     | 11     | 38         | 1     | 12                      | 8    |
| 1982 | 100   | 32     | 9      | 38         | 1     | 13                      | 8    |
| 1983 | 100   | 36     | 9      | 34         | 2     | 13                      | 7    |
| 1984 | 100   | 36     | 9      | 33         | 2     | 13                      | 7    |
| 1985 | 100   | 37     | 9      | 32         | 2     | 13                      | 7    |
| 1986 | 100   | 38     | 9      | 30         | 2     | 14                      | 7    |
| 1987 | 100   | 39     | 9      | 29         | 2     | 14                      | 7    |
| 1988 | 100   | 40     | 9      | 28         | 2     | 14                      | 7    |
| 1989 | 100   | 40     | 9      | 27         | 2     | 15                      | 7    |
| 1990 | 100   | 40     | 9      | 26         | 2     | 15                      | 7    |

**Table 3.3.4**

WAGES BY LAND USE ACTIVITIES  
 Percentage change of annual wages adjusted by Inflation (CPI 1982-84=100)  
 1976-1990

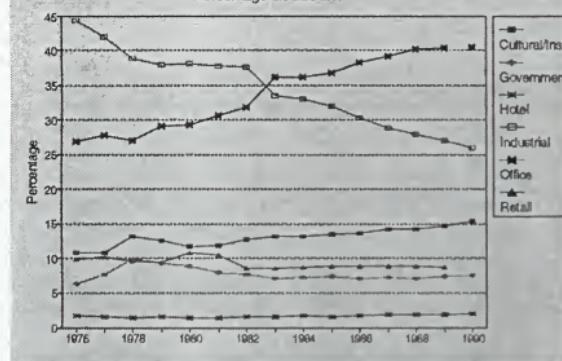
| YEAR    | TOTAL | OFFICE | RETAIL | INDUSTRIAL | HOTEL | CULTURAL/<br>INSTITUTNL | GOVT |
|---------|-------|--------|--------|------------|-------|-------------------------|------|
| 1976-77 | 11    | 15     | 14     | 5          | -3    | 11                      | 34   |
| 1977-78 | 9     | 6      | 2      | 1          | 7     | 33                      | 39   |
| 1978-79 | 3     | 11     | 2      | 0          | 6     | -3                      | -3   |
| 1979-80 | -0    | 0      | 13     | -0         | -12   | -8                      | -5   |
| 1980-81 | -1    | 4      | -3     | -1         | -2    | 1                       | -11  |
| 1981-82 | 1     | 5      | -18    | 1          | 14    | 9                       | -3   |
| 1982-83 | 5     | 20     | 6      | -7         | 8     | 8                       | -3   |
| 1983-84 | 1     | 1      | 3      | 0          | 11    | 1                       | 5    |
| 1984-85 | 2     | 4      | 4      | -1         | 0     | 5                       | 4    |
| 1985-86 | 3     | 8      | 4      | -2         | 5     | 5                       | -1   |
| 1986-87 | 1     | 3      | 1      | -5         | 10    | 5                       | 3    |
| 1987-88 | 1     | 4      | -0     | -2         | 6     | 0                       | -1   |
| 1988-89 | -1    | 0      | -1     | -4         | -5    | 3                       | 4    |
| 1989-90 | 1     | 1      | -1     | -3         | 9     | 6                       | 3    |
| 1976-90 | 42    | 115    | 24     | -16        | 67    | 103                     | 67   |

Source: Department of City Planning  
 Employment Development Department

Looking at the wage distribution among Land Use Activities from the third table, there are significant changes between 1976 and 1990. In 1976, Industrial Activity represented 44% of total city wages. This dropped to 26% in 1990. The opposite trend occurred in Office Activity, which increased from 27% of total wages in 1976 to 40% in 1990. Cultural/Institutional Activities also show an increase during this period, going from 11% to 15% of total wages.

Government and Hotel Activities increased their shares of total wages much less dramatically, going from 6% and 1.7% of total wages in 1976, respectively, to 7% and 2% in 1990. The share of total wages earned in the Retail sector decreased slightly from 10% to 9%. These last three activities together represent about 18% of total City wages.

WAGES BY LAND USE ACTIVITIES  
Percentage distribution

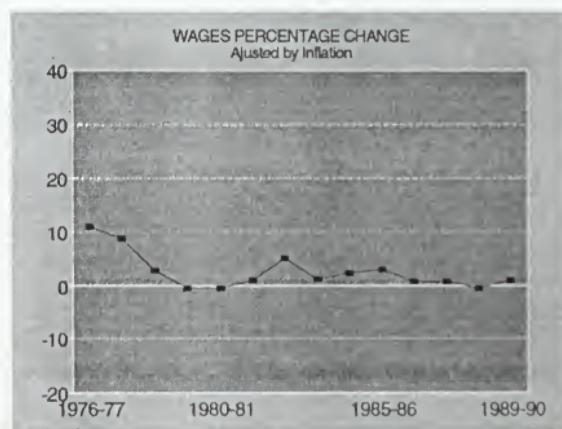


Graph 3.3.2

Source:

Department of City Planning  
Employment Development Department

WAGES PERCENTAGE CHANGE  
Adjusted by Inflation



Graph 3.3.3

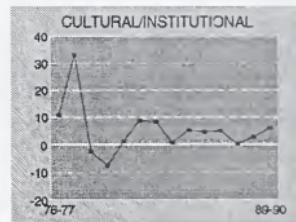
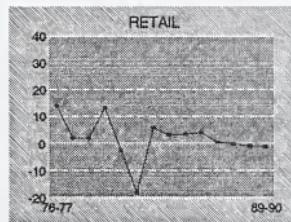
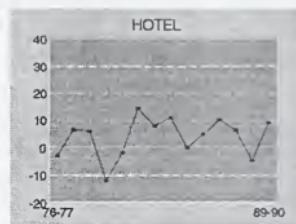
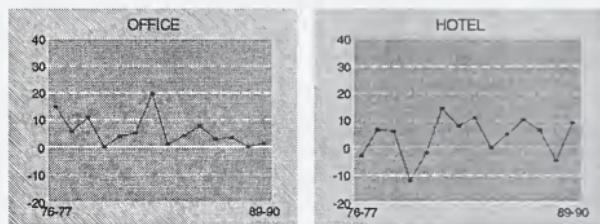
Source:

Department of City Planning  
Employment Development Department

**Graph 3.3.4**

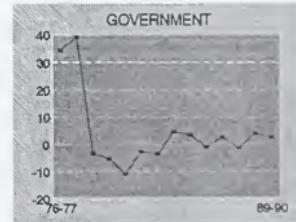
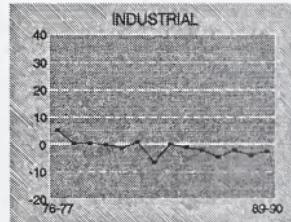
**PERCENTAGE CHANGE OF ANNUAL WAGES ADJUSTED BY INFLATION**

(CPI 1982-84=100)



Source:

Department of City Planning  
Employment Development  
Department



### **3.3.1.2 BUREAU OF ECONOMIC ANALYSIS DATA**

The second set of data is published annually by the Regional Economic Measurement Division of the Bureau of Economic Analysis (BEA). It has the advantage of including earnings from self-employed persons which are not included in the EDD's wage and salary data above. The personal income data do not contain enough description of the type of employment to use the Land Use Activity classifications developed for this inventory and used elsewhere in this report.

The BEA defines Personal income as the sum of wage and salary disbursements, other labor income, proprietors' income, rental income of persons, personal dividend income, personal interest income, and transfer payments, less personal contributions for social insurance. Included here is a subset of that personal income data, "personal income by place of work," which includes wage and salary income, other labor income, and proprietors' income only. The income data are reported by employing establishments. Data about proprietors are reported by tax-filing address, which is the place of residence of the proprietor. The BEA assumes that this is also the place of work. However this may not always be the case, particularly in San Francisco where self-employed people (including some who do not live in San Francisco) may be likely to work outside of their home.

These data are presented under two categories: by earning type and by industry group. Four tables are presented for each category following the previous format, current dollars, dollars adjusted for inflation, percentage distribution by industry group, and percentage change over time.

The total volume of earnings in 1989 (in 1989 dollars) was \$22.9 billion. This was an increase of about \$10 billion (unadjusted for inflation) from 1981. In adjusted dollars (1982-84=100), the total earnings in 1989 was \$18.1 billion (1982 dollars). This was an increase of \$3.1 billion, or 21%, from 1981. The years 1983 and 1989 showed the greatest increases. The largest increase was within services, where income grew by 69% during this period.

The proportion of income coming from wages and salaries has decreased over time, while the percentage of income earned by the self-employed has increased. In 1981, 88% of this income was from wages and salaries, while 7% was from proprietors' income. In 1989 over 80% was from wages and salaries and 12% was from proprietors' income. The growth in wages and salaries was relatively constant, ranging from increases of about 6% in 1982 and 1989 to a loss of 4% in 1988.

Proprietors' income has been much more volatile; the largest increase was 33% in 1983, and declines occurred in two years, the largest being 11% in 1982.

Tables 3.3.6 through 3.3.9 describe income distribution by main industry groups (SIC) with sub-categories for manufacturing and government. Through the 1980s, San Francisco workers

**Table 3.3.5**

PERSONAL INCOME BY PLACE OF WORK BY EARNING TYPE  
Earnings In \$1,000  
1981-1989

|                     | 1981              | 1982              | 1983              | 1984              | 1985              | 1986              | 1987              | 1988              | 1989              |
|---------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Wages and Salaries  | 11,517,526        | 12,420,176        | 13,277,476        | 14,200,425        | 15,112,860        | 16,052,893        | 16,613,259        | 16,660,443        | 18,526,919        |
| Other labor income  | 1,125,502         | 1,306,132         | 1,389,133         | 1,417,431         | 1,416,706         | 1,482,527         | 1,503,498         | 1,487,016         | 1,638,962         |
| Proprietors' Income | 1,009,270         | 962,011           | 1,290,144         | 1,514,831         | 1,794,484         | 1,987,869         | 2,260,448         | 2,337,818         | 2,740,558         |
| <b>TOTAL</b>        | <b>13,652,298</b> | <b>14,688,319</b> | <b>15,956,753</b> | <b>17,132,687</b> | <b>18,324,050</b> | <b>19,523,289</b> | <b>20,377,205</b> | <b>20,485,277</b> | <b>22,906,439</b> |

Earnings adjusted by inflation (CPI 1982=100) In \$1,000  
1981-1989

|                     | 1981              | 1982              | 1983              | 1984              | 1985              | 1986              | 1987              | 1988              | 1989              |
|---------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Wages and Salaries  | 12,684,500        | 12,725,590        | 13,493,370        | 13,654,255        | 13,941,753        | 14,384,313        | 14,396,238        | 13,826,094        | 14,657,373        |
| Other labor income  | 1,239,540         | 1,338,250         | 1,411,721         | 1,362,914         | 1,306,924         | 1,328,429         | 1,302,858         | 1,234,038         | 1,296,647         |
| Proprietors' Income | 1,111,531         | 985,667           | 1,311,122         | 1,456,568         | 1,655,428         | 1,781,245         | 1,958,794         | 1,940,098         | 2,168,163         |
| <b>TOTAL</b>        | <b>15,035,570</b> | <b>15,049,507</b> | <b>16,216,212</b> | <b>16,473,738</b> | <b>16,904,105</b> | <b>17,493,987</b> | <b>17,657,890</b> | <b>17,000,230</b> | <b>18,122,183</b> |

Percentage distribution by earning type  
1981-1989

|                     | 1981       | 1982       | 1983       | 1984       | 1985       | 1986       | 1987       | 1988       | 1989       |
|---------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| Wages and Salaries  | 84         | 85         | 83         | 83         | 82         | 82         | 82         | 81         | 81         |
| Other labor income  | 8          | 9          | 9          | 8          | 8          | 8          | 7          | 7          | 7          |
| Proprietors' Income | 7          | 7          | 8          | 9          | 10         | 10         | 11         | 11         | 12         |
| <b>TOTAL</b>        | <b>100</b> |

Percentage change of earnings adjusted by inflation (CPI 1982=100)  
1981-1989

|                     | 1981-82  | 1982-83  | 1983-84  | 1984-85  | 1985-86  | 1986-87  | 1987-88   | 1988-89  | 1981-89   |
|---------------------|----------|----------|----------|----------|----------|----------|-----------|----------|-----------|
| Wages and Salaries  | 0        | 6        | 1        | 2        | 3        | 0        | -4        | 6        | 16        |
| Other labor income  | 8        | 5        | -3       | -4       | 2        | -2       | -5        | 5        | 5         |
| Proprietors' Income | -11      | 33       | 11       | 14       | 8        | 10       | -1        | 12       | 95        |
| <b>TOTAL</b>        | <b>0</b> | <b>8</b> | <b>2</b> | <b>3</b> | <b>3</b> | <b>1</b> | <b>-4</b> | <b>7</b> | <b>21</b> |

Source: Department of City Planning  
US Department of Commerce, Bureau of Economic Analysis

PERSONAL INCOME BY PLACE OF WORK BY INDUSTRY GROUP  
Earnings in \$1,000  
1981-1989

|                | 1981       | 1982       | 1983       | 1984       | 1985       | 1986       | 1987       | 1988       | 1989       |
|----------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| Agricultural   | 21,211     | 21,330     | 26,193     | 26,380     | 29,151     | 30,466     | 38,069     | 37,923     | 42,259     |
| Mining         | 170,670    | 169,766    | 200,710    | 187,687    | 201,294    | 132,009    | 96,366     | 100,152    | 90,708     |
| Construction   | 865,205    | 1,027,534  | 648,819    | 657,655    | 707,479    | 792,924    | 858,520    | 853,734    | 826,422    |
| Manufacturing  | 1,253,979  | 1,349,979  | 1,380,836  | 1,422,562  | 1,363,166  | 1,382,408  | 1,423,612  | 1,428,023  | 1,520,465  |
| Non durable    | 926,499    | 1,027,408  | 1,073,972  | 1,089,315  | 1,035,479  | 1,090,436  | 1,111,296  | 1,116,078  | 1,203,708  |
| Durable        | 327,480    | 322,571    | 306,864    | 333,247    | 327,687    | 291,972    | 312,316    | 311,945    | 316,757    |
| Transp. & P.U. | 1,592,653  | 1,662,843  | 1,782,861  | 1,843,325  | 1,882,551  | 1,786,367  | 1,688,492  | 1,705,049  | 1,727,506  |
| Wholesale      | 1,093,065  | 1,096,872  | 1,087,295  | 1,254,882  | 1,346,191  | 1,430,041  | 1,318,020  | 1,331,520  | 1,459,056  |
| Retail trade   | 1,019,720  | 1,072,691  | 1,160,554  | 1,230,815  | 1,319,546  | 1,427,008  | 1,491,858  | 1,488,654  | 1,662,173  |
| F.I.R.E.       | 2,179,204  | 2,350,933  | 2,744,241  | 2,887,567  | 3,206,712  | 3,689,206  | 3,870,688  | 3,984,959  | 4,183,808  |
| Services       | 3,452,486  | 3,823,734  | 4,665,771  | 5,175,007  | 5,619,825  | 6,115,079  | 6,662,501  | 7,375,622  | 8,127,590  |
| Government     | 2,004,105  | 2,112,637  | 2,259,471  | 2,444,807  | 2,648,135  | 2,735,781  | 2,928,779  | 2,924,560  | 3,264,452  |
| Federal        | 701,268    | 715,243    | 768,797    | 818,890    | 856,340    | 844,739    | 867,755    | 665,445    | 960,855    |
| Military       | 127,171    | 145,005    | 150,167    | 156,247    | 159,112    | 159,663    | 161,537    | 161,190    | 147,378    |
| State & local  | 1,175,646  | 1,252,389  | 1,340,607  | 1,469,670  | 1,632,683  | 1,731,379  | 1,899,487  | 1,897,925  | 2,156,221  |
| TOTAL          | 13,652,298 | 14,688,319 | 15,956,753 | 17,132,687 | 18,324,050 | 19,523,289 | 20,377,205 | 21,606,960 | 22,906,439 |

PERSONAL INCOME BY PLACE OF WORK BY INDUSTRY GROUP  
Earnings adjusted by Inflation (CPI 1982=100) in \$1,000  
1981-1989

|                | 1981       | 1982       | 1983       | 1984       | 1985       | 1986       | 1987       | 1988       | 1989       |
|----------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| Agricultural   | 23,360     | 21,855     | 26,619     | 27,288     | 26,892     | 27,299     | 32,969     | 31,471     | 33,433     |
| Mining         | 187,963    | 173,941    | 203,974    | 180,468    | 185,696    | 118,288    | 83,506     | 83,114     | 71,763     |
| Construction   | 952,869    | 1,052,801  | 659,369    | 632,361    | 652,656    | 710,505    | 743,951    | 708,493    | 663,815    |
| Manufacturing  | 1,381,034  | 1,383,176  | 1,403,284  | 1,367,848  | 1,257,533  | 1,238,717  | 1,233,633  | 1,185,081  | 1,202,900  |
| Non durable    | 1,020,373  | 1,052,672  | 1,091,435  | 1,047,418  | 955,239    | 977,093    | 962,995    | 926,206    | 952,301    |
| Durable        | 360,661    | 330,503    | 311,854    | 320,430    | 302,294    | 261,624    | 270,638    | 258,876    | 250,599    |
| Transp. & P.U. | 1,754,023  | 1,703,733  | 1,811,851  | 1,772,428  | 1,736,671  | 1,602,479  | 1,463,165  | 1,414,978  | 1,366,698  |
| Wholesale      | 1,203,816  | 1,123,844  | 1,104,975  | 1,206,617  | 1,241,874  | 1,281,399  | 1,142,132  | 1,104,996  | 1,154,316  |
| Retail trade   | 1,123,040  | 1,099,069  | 1,179,427  | 1,183,476  | 1,217,294  | 1,278,681  | 1,292,771  | 1,235,938  | 1,315,010  |
| F.I.R.E.       | 2,400,004  | 2,408,743  | 2,788,863  | 2,776,507  | 2,958,221  | 3,305,740  | 3,354,149  | 3,307,020  | 3,309,975  |
| Services       | 3,802,297  | 3,917,760  | 4,741,637  | 4,975,968  | 5,184,340  | 5,479,461  | 5,773,398  | 6,120,848  | 6,430,055  |
| Government     | 2,207,164  | 2,164,587  | 2,296,210  | 2,350,076  | 2,442,929  | 2,451,417  | 2,537,937  | 2,427,021  | 2,582,636  |
| Federal        | 772,322    | 732,831    | 781,298    | 787,394    | 789,982    | 766,935    | 761,954    | 662,237    | 760,170    |
| Military       | 140,056    | 148,571    | 162,609    | 160,238    | 146,782    | 143,067    | 139,980    | 133,768    | 116,597    |
| State & local  | 1,294,764  | 1,283,185  | 1,362,304  | 1,413,144  | 1,506,165  | 1,561,416  | 1,646,003  | 1,675,041  | 1,706,871  |
| TOTAL          | 15,035,570 | 15,049,507 | 16,216,212 | 16,473,738 | 16,904,105 | 17,493,967 | 17,657,890 | 17,931,067 | 18,122,163 |

Source: Department of City Planning  
US Department of Commerce, Bureau of Economic Analysis

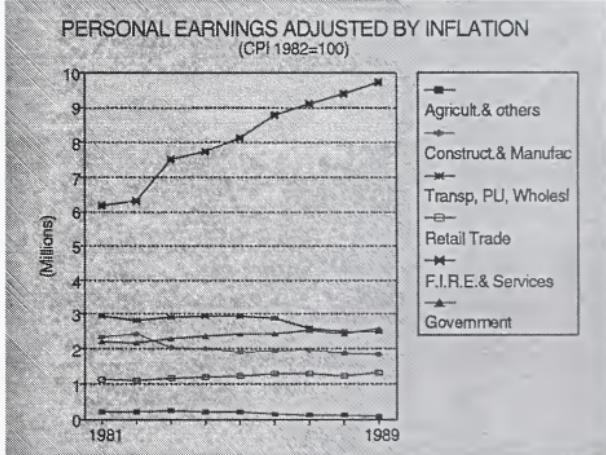
Table 3.3.6

Table 3.3.7

have increasingly earned larger proportions of their total income in a few industries. In 1989, the largest industries were services (36%) and F.I.R.E. (18%). These were also the largest industries from 1981 but represented smaller percentages of total income: services represented 25% and F.I.R.E. 16% of total income.

The shares of total income derived from the construction, manufacturing, transportation/utilities, and wholesale trade sectors declined from 1981 to 1989. Although the share of total income from government employment remained fairly stable, federal employment (both civilian and military) declined while state and local employment income increased.

**Graph 3.3.5**



PERSONAL INCOME BY PLACE OF WORK BY INDUSTRY GROUP  
 Percentage distribution by industry group  
 1981-1989

Table 3.3.8

|                | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 |
|----------------|------|------|------|------|------|------|------|------|------|
| Agricultural   | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 0    |
| Mining         | 1    | 1    | 1    | 1    | 1    | 1    | 0    | 0    | 0    |
| Construction   | 6    | 7    | 4    | 4    | 4    | 4    | 4    | 4    | 4    |
| Manufacturing  | 9    | 9    | 9    | 8    | 7    | 7    | 7    | 7    | 7    |
| Non durable    | 7    | 7    | 7    | 6    | 6    | 6    | 5    | 5    | 5    |
| Durable        | 2    | 2    | 2    | 2    | 2    | 2    | 2    | 1    | 1    |
| Transp. & P.U. | 12   | 11   | 11   | 11   | 10   | 9    | 8    | 8    | 8    |
| Wholesale      | 8    | 7    | 7    | 7    | 7    | 7    | 6    | 6    | 6    |
| Retail trade   | 7    | 7    | 7    | 7    | 7    | 7    | 7    | 7    | 7    |
| F.I.R.E.       | 16   | 16   | 17   | 17   | 18   | 19   | 19   | 18   | 18   |
| Services       | 25   | 26   | 29   | 30   | 31   | 31   | 33   | 34   | 35   |
| Government     | 15   | 14   | 14   | 14   | 14   | 14   | 14   | 14   | 14   |
| Federal        | 5    | 5    | 5    | 5    | 5    | 4    | 4    | 3    | 4    |
| Military       | 1    | 1    | 1    | 1    | 1    | 1    | 1    | 1    | 1    |
| State & local  | 9    | 9    | 8    | 9    | 9    | 9    | 9    | 9    | 9    |
| TOTAL          | 100  | 100  | 100  | 100  | 100  | 100  | 100  | 100  | 100  |

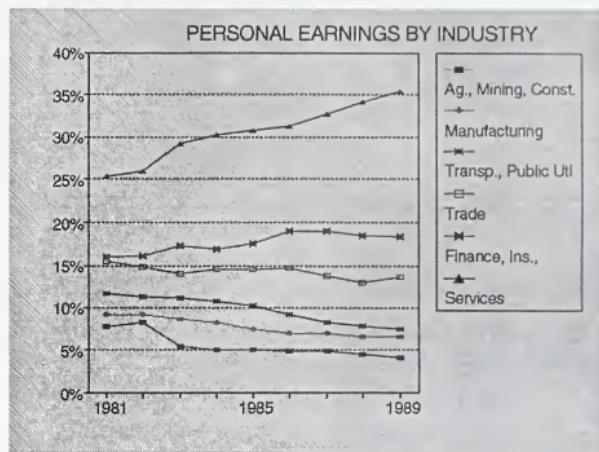
PERSONAL INCOME BY PLACE OF WORK BY INDUSTRY GROUP  
 Percentage change of earnings adjusted by inflation (CPI 1982=100)  
 1981-1989

Table 3.3.9

|                | 1981-82 | 1982-83 | 1983-84 | 1984-85 | 1985-86 | 1986-87 | 1987-88 | 1988-89 | 1981-89 |
|----------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Agricultural   | -6      | 22      | 3       | -1      | 2       | 21      | -5      | 6       | 43      |
| Mining         | -7      | 17      | -12     | 3       | -36     | -29     | -0      | -14     | -62     |
| Construction   | 10      | -37     | -4      | 3       | 9       | 5       | -5      | -8      | -31     |
| Manufacturing  | 0       | 1       | -3      | -8      | -2      | -0      | -4      | 2       | -13     |
| Non durable    | 3       | 4       | -4      | -9      | 2       | -1      | -4      | 3       | -7      |
| Durable        | -8      | -6      | 3       | -6      | -13     | 3       | -4      | -3      | -31     |
| Transp. & P.U. | -3      | 6       | -2      | -2      | -8      | -9      | -3      | -3      | -22     |
| Wholesale      | -7      | -2      | 9       | 3       | 3       | -11     | -3      | 4       | -4      |
| Retail trade   | -2      | 7       | 0       | 3       | 5       | 1       | -4      | 6       | 17      |
| F.I.R.E.       | 0       | 16      | -0      | 7       | 12      | 1       | -1      | 0       | 38      |
| Services       | 3       | 21      | 5       | 4       | 6       | 5       | 6       | 5       | 69      |
| Government     | -2      | 6       | 2       | 4       | 0       | 4       | -4      | 6       | 17      |
| Federal        | -5      | 7       | 1       | 0       | -4      | -1      | -27     | 38      | -2      |
| Military       | 6       | 3       | -2      | -2      | -3      | -2      | -4      | -13     | -17     |
| State & local  | -1      | 6       | 4       | 7       | 3       | 6       | -4      | 8       | 32      |
| TOTAL          | 0       | 8       | 2       | 3       | 3       | 1       | 2       | 1       | 21      |

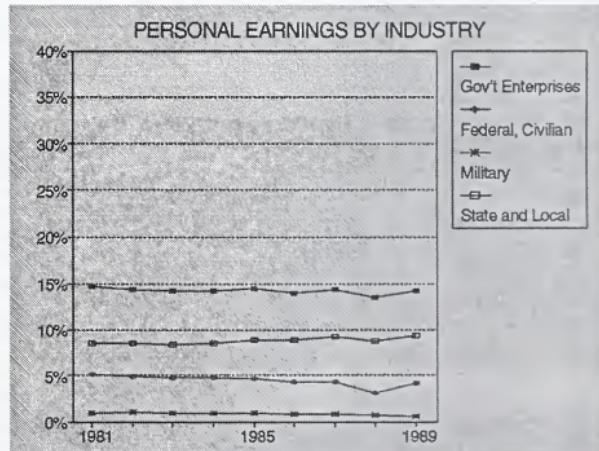
Source: Department of City Planning  
 US Department of Commerce, Bureau of Economic Analysis

**Graph 3.3.5**



Source:

Department of City  
Planning  
U.S. Department of  
Commerce, Bureau of  
Economic Analysis



### **3.3.2 BUSINESS REVENUES**

This section contains two data sets. The U.S. Department of Commerce, Bureau of the Census conducts economic censuses every five years, covering the years ending in "2" and "7." This program collects information about firms and establishments engaged in providing goods and services. The following tables, Tables 3.3.10 through 3.3.18, present some of these data for 1982 and 1987, from the censuses of manufactures, service industries, retail trade, and wholesale trade. These data are presented by Standard Industrial Classification (SIC) Code, which is described in Data Formats Section, page 6. This inventory generally uses two and three digit SICs.

Additional information about retail trade is provided by data on taxable sales provided by the State of California Board of Equalization and shown in Table 3.3.19. These two data sources also contain useful information about the number of establishments and employees, but in this inventory, we are emphasizing the business revenues element of these data sets.

#### **3.3.2.1 Manufacturing Revenues**

Manufacturing is a component of Industrial Activity, according to the Land Use Activity classification defined for this inventory. The census of manufactures covers establishments engaged in the mechanical or chemical transformation of materials or substances into new products. It includes SIC codes 20 through 39. All of these SIC codes with establishments in San Francisco are included in Tables 3.3.10 through 3.3.18. Auxiliary establishments are those where employees are primarily engaged in support services for other establishments of the same company, such as administrative functions, central warehouse, research, or testing.

Table 3.3.10 shows that in 1982, there were about 1500 manufacturing establishments, with about 51,000 employees. Eighty-one of these establishments were auxiliary establishments which produced nothing on their own. San Francisco manufacturing establishments shipped merchandise worth about \$3.1 billion (1982 dollars). Three Industries, Food, Apparel, and Printing accounted for 73% of the value of merchandise shipped. No other industry accounted for more than 9% of the value of merchandise shipped.

In 1987, the number of manufacturing establishments had increased from 1500 to 1600, but their employees decreased

**Table 3.3.10**

MANUFACTURES, PAYROLL EMPLOYER STATISTICS 1982

| SIC | INDUSTRIES                       | ESTAB. | EMPLOYEES<br>(1,000s) | VALUE ADDED BY<br>MANUFACTURE<br>(\$million) | VALUE OF<br>SHIPMENTS<br>(\$million) |
|-----|----------------------------------|--------|-----------------------|--|--------------------------------------|
| 20  | Food & Kindred Products          | 115    | 3.7                   | 268.3  | 787.8                                |
| 22  | Apparel & Other Textile Products | 424    | 10.0                  | 385.7  | 794.8                                |
| 24  | Lumber & Wood Products           | 41     | 0.5                   | 12.6   | 27.2                                 |
| 25  | Furniture & Fixtures             | 50     | 1.0                   | 31.9   | 53.3                                 |
| 26  | Paper and allied products        | 18     | 0.5                   | 11.7   | 23.2                                 |
| 27  | Printing & Publishing            | 415    | 9.7                   | 388.3  | 668.6                                |
| 28  | Chemicals & Allied Products      | 28     | 0.5                   | 50   | 102.2                                |
| 34  | Fabricated Metal Products        | 85     | 1.7                   | 84.1   | 153.4                                |
| 35  | Industrial Machinery & Equipment | 71     | 1.3                   | 47.7   | 84.1                                 |
| 36  | Electronic & Electric Equipment  | 52     | 1.8                   | 64.4   | 103.2                                |
| 37  | Transportation Equipment         | 30     | 2.7                   | 149.4  | 247.6                                |
| 39  | Misc. Manufacturing Industries   | 89     | 1.0                   | 25.1   | 47.5                                 |
|     | Auxiliaries                      | 81     | 16.6                  |  |                                      |
|     | TOTAL                            | 1499   | 51.0                  | 1519.20                                      | 3092.90                              |

## MANUFACTURES, PAYROLL EMPLOYER STATISTICS, 1982

Percentage Distribution by Industry Group

| SIC | INDUSTRIES                       | ESTAB. | EMPLOYEES<br>(1,000s) | VALUE ADDED BY<br>MANUFACTURE | VALUE OF<br>SHIPMENTS |
|-----|----------------------------------|--------|-----------------------|-------------------------------|-----------------------|
| 20  | Food & Kindred Products          | 8      | 7                     | 18                            | 25                    |
| 22  | Apparel & Other Textile Products | 28     | 20                    | 25                            | 26                    |
| 24  | Lumber & Wood Products           | 3      | 1                     | 1                             | 1                     |
| 25  | Furniture & Fixtures             | 3      | 2                     | 2                             | 2                     |
| 26  | Paper & allied products          | 1      | 1                     | 1                             | 1                     |
| 27  | Printing & Publishing            | 28     | 19                    | 26                            | 22                    |
| 28  | Chemicals & Allied Products      | 2      | 1                     | 3                             | 3                     |
| 34  | Fabricated Metal Products        | 6      | 3                     | 6                             | 5                     |
| 35  | Industrial Machinery & Equipment | 5      | 3                     | 3                             | 3                     |
| 36  | Electronic & Electric Equipment  | 3      | 4                     | 4                             | 3                     |
| 37  | Transportation Equipment         | 2      | 5                     | 10                            | 8                     |
| 39  | Misc. Manufacturing Industries   | 6      | 2                     | 2                             | 2                     |
|     | Auxiliaries                      | 5      | 33                    | 0                             | 0                     |
|     | TOTAL                            | 100    | 100                   | 100                           | 100                   |

Source: Department of City Planning  
U.S. Department of Commerce, Bureau of the Census

In number from 51,000 to 41,100. The total value of merchandise shipped rose to \$4.5 billion (1987 dollars). Food, Apparel and Printing remained the largest three industries in terms of value of merchandise, totalling 75% of the total. The share of the total value shipped by Food and by Apparel shrank over the five years, while the share of the total shipped by Printing establishments increased from 22% of the total in 1982 to 39% of the total in 1987.

| SIC   | INDUSTRIES                            | ESTAB. | EMPLOYEES<br>(1,000s) | VALUE ADDED BY<br>MANUFACTURE<br>(\$million) | VALUE OF<br>SHIPMENTS<br>(\$million) |
|-------|---------------------------------------|--------|-----------------------|--|--------------------------------------|
| 20    | Food & Kindred Products               | 107    | 2.9                   | 319.8  | 629.7                                |
| 22    | Apparel & Other Textile Products      | 414    | 10.4                  | 333.6  | 983.5                                |
| 24    | Lumber & Wood Products                | 50     | 0.7                   | 33   | 64.7                                 |
| 25    | Furniture & Fixtures                  | 56     | 1.2                   | 52.5   | 80                                   |
| 27    | Printing & Publishing                 | 461    | 10.5                  | 1304.3                                       | 1728.7                               |
| 28    | Chemicals & Allied Products           | 28     | —                     | —  | —                                    |
| 30    | Rubber & Misc. Plastics Products      | 23     | 0.5                   | 27.2   | 51.5                                 |
| 34    | Fabricated Metal Products             | 102    | 2.2                   | 119.4  | 233.6                                |
| 35    | Industrial Machinery & Equipment      | 71     | 1.1                   | 53.6   | 99.4                                 |
| 36    | Electronic & Other Electric Equipment | 73     | 3                     | 160.7  | 254.9                                |
| 37    | Transportation Equipment              | 31     | 2.1                   | 128  | 207.7                                |
| 38    | Instruments & Related Products        | 37     | —                     | —  | —                                    |
| 39    | Misc. Manufacturing Industries        | 97     | 0.9                   | 37.3   | 66.3                                 |
|       | Auxilaries                            | 64     | 5.6                   | —  | —                                    |
| TOTAL |                                       | 1614   | 41.10                 | 2606.70                                      | 4466.30                              |

## MANUFACTURES, PAYROLL EMPLOYER STATISTICS, 1987

Percentage distribution by Industry Groups

| SIC   | INDUSTRIES                            | ESTAB. | EMPLOYEES<br>(1,000s) | VALUE ADDED BY<br>MANUFACTURE | VALUE OF<br>SHIPMENTS |
|-------|---------------------------------------|--------|-----------------------|-------------------------------|-----------------------|
| 20    | Food & Kindred Products               | 7      | 7                     | 12                            | 14                    |
| 22    | Apparel & Other Textile Products      | 26     | 25                    | 13                            | 22                    |
| 24    | Lumber & Wood Products                | 3      | 2                     | 1                             | 1                     |
| 25    | Furniture & Fixtures                  | 3      | 3                     | 2                             | 2                     |
| 27    | Printing & Publishing                 | 29     | 26                    | 50                            | 39                    |
| 28    | Chemicals & Allied Products           | 2      | —                     | —                             | —                     |
| 30    | Rubber & Misc. Plastics Products      | 1      | 1                     | 1                             | 1                     |
| 34    | Fabricated Metal Products             | 6      | 5                     | 5                             | 5                     |
| 35    | Industrial Machinery & Equipment      | 4      | 3                     | 2                             | 2                     |
| 36    | Electronic & Other Electric Equipment | 5      | 7                     | 6                             | 6                     |
| 37    | Transportation Equipment              | 2      | 5                     | 5                             | 5                     |
| 38    | Instruments & Related Products        | 2      | —                     | —                             | —                     |
| 39    | Misc. Manufacturing Industries        | 6      | 2                     | 1                             | 1                     |
|       | Auxilaries                            | 4      | 14                    | —                             | —                     |
| TOTAL |                                       | 100    | 100                   | 100                           | 100                   |

Source: Department of City Planning  
U.S. Department of Commerce, Bureau of the Census

### 3.3.2.2 Service Industry Revenue

Data from the Census of Service Industries is shown on Tables 3.3.12 to 3.3.14. Service establishments with payrolls are described in Tables 3.3.12 and 3.3.13, while those without payrolls (generally sole proprietorships) are described in Table 3.3.14.

In 1982 there were about 8,200 establishments which employed about 101,000 people and had annual receipts of \$4.9

**Table 3.3.12**

SERVICE INDUSTRIES PAYROLL EMPLOYER STATISTICS, 1982

| SIC      | INDUSTRIES                         | ESTAB. | RECEIPTS<br>(\$1,000) | PAID EMPLOYEES<br>FOR PAY PERIOD<br>INCLUDING 3/12 |
|----------|------------------------------------|--------|-----------------------|--|
| 70       | Hotels, Rooming Houses, Etc        | 254    | 544,837               | 13,192   |
| 72       | Personal Services                  | 660    | 127,879               | 4,75   |
| 73       | Business Services                  | 1,858  | 1402,254              | 38,238   |
| 75       | Automotive Repair, Services Etc    | 496    | 224,835               | 3,006  |
| 76       | Miscellaneous Repair Services      | 177    | 41,755                | 865  |
| 78,79,84 | Amusement and Recreation Services  | 363    | 314,764               | 4,249  |
| 80       | Health Services                    | 2,055  | 499,977               | 9,854  |
| 81       | Legal Services                     | 1,354  | 793,578               | 11,234   |
| 823,4,9  | Selected Educational Services      | 83     | 32,792                | 913  |
| 891      | Engr, Arch & Surveying Services    | 415    | 668,912               | 9,156  |
| 893      | Acc, Auditing, & Bkeeping Services | 352    | 235,252               | 3,905  |
| 83,892,9 | Social & Other Services            | 161    | 37,692                | 1,144  |
| TOTAL    |                                    | 8,228  | 4,924,527             | 100,531  |

SERVICE INDUSTRIES PAYROLL EMPLOYER STATISTICS, 1982

Percentage distribution by Industry Groups

| SIC      | INDUSTRIES                         | ESTAB. | RECEIPTS | PAID EMPLOYEES<br>FOR PAY PERIOD<br>INCLUDING 3/12 |
|----------|------------------------------------|--------|----------|--|
| 70       | Hotels, Rooming Houses, Etc        | 3      | 11       | 13   |
| 72       | Personal Services                  | 8      | 3        | 5  |
| 73       | Business Services                  | 23     | 28       | 38   |
| 75       | Automotive Repair, Services Etc    | 6      | 5        | 3  |
| 76       | Miscellaneous Repair Services      | 2      | 1        | 1  |
| 78,79,84 | Amusement and Recreation Services  | 4      | 6        | 4  |
| 80       | Health Services                    | 25     | 10       | 10   |
| 81       | Legal Services                     | 16     | 16       | 11   |
| 823,4,9  | Selected Educational Services      | 1      | 1        | 1  |
| 891      | Engr, Arch & Surveying Services    | 5      | 14       | 9  |
| 893      | Acc, Auditing, & Bkeeping Services | 4      | 5        | 4  |
| 83,892,9 | Social & Other Services            | 2      | 1        | 1  |
| TOTAL    |                                    | 100    | 100      | 100  |

Source: Department of City Planning  
U.S. Department of Commerce, Bureau of the Census

Table 3.3.13

|          | BUSINESS                           | ESTAB. | RECEIPTS<br>(\$1,000) | EMPLOYMENT |
|----------|------------------------------------|--------|-----------------------|------------|
| 70       | Hotels, Rooming Houses, Etc        | 290    | 794,619               | 16,667     |
| 72       | Personal Services                  | 793    | 17,527                | 6,895      |
| 73       | Business Services                  | 2,145  | 1,941,982             | 42,055     |
| 731      | Advertising                        | 218    | 288,442               | 3,102      |
| 732      | Consumer Credit                    | 27     | 17,527                | 402        |
| 733      | Mailing, Repro, Comm Art, Etc      | 379    | 248,437               | 3,531      |
| 733.6    | Comm Photography, Etc              | 233    | 126,753               | 1,198      |
| 734      | Servs to Dwellings And Other Bldgs | 160    | 141,844               | 5,378      |
| 735      | Misc Equip, Rntl And Leasing       | 111    | 169,244               | 1,413      |
| 736      | Personnel Supply Svcs              | 279    | 239,104               | 14,513     |
| 737      | Comp Prog, Data Proc, Etc          | 428    | 495,398               | 4,735      |
| 738      | Misc Business Svcs                 | 543    | 341,986               | 8,981      |
| 75       | Auto Repair Svcs And Repair        | 605    | 473,082               | 4,172      |
| 76       | Misc Repair Svcs                   | 197    | 67,969                | 1,030      |
| 78,79,84 | Amusement And Rec Svcs             | 473    | 442,327               | 5,799      |
| 80       | Health Services                    | 2,251  | 829,409               | 12,893     |
| 81       | Legal Services                     | 1,631  | 1,706,551             | 16,906     |
| 823      | Selctd Educational Svcs            | 107    | 56,356                | 1,417      |
| 86       | Social Services                    | 180    | 33,872                | 1,367      |
| 87       | Eng, Acct, Research Mgmt           | 1,742  | 2,221,186             | 29,678     |
| 871      | Eng Architctrl Surv Svcs           | 541    | 1,065,018             | 14,350     |
| 872      | Acct, Aud, And Bkpp Svcs           | 471    | 449,480               | 5,567      |
| 873      | Resrch Devl Testing Serv           | 106    | 87,644                | 1,168      |
| 874      | Mgmt And Pub Relation Svcs         | 624    | 619,664               | 8,593      |
| 89       | Services N.E.C.                    | 124    | 47,962                | 723        |
|          | TOTAL                              | 10,538 | 8,794,462             | 139,602    |

|          | BUSINESS                           | ESTAB. | RECEIPTS<br>(\$1,000) | EMPLOYMENT |
|----------|------------------------------------|--------|-----------------------|------------|
| 70       | Hotels, Rooming Houses, Etc        | 3      | 9                     | 12         |
| 72       | Personal Services                  | 8      | 2                     | 5          |
| 73       | Business Services                  | 20     | 22                    | 30         |
| 731      | Advertising                        | 2      | 3                     | 2          |
| 732      | Consumer Credit                    | 0      | 0                     | 0          |
| 733      | Mailing, Repro, Comm Art, Etc      | 4      | 3                     | 3          |
| 733.6    | Comm Photography, Etc              | 2      | 1                     | 1          |
| 734      | Servs to Dwellings And Other Bldgs | 2      | 2                     | 4          |
| 735      | Misc Equip, Rntl And Leasing       | 1      | 2                     | 1          |
| 736      | Personnel Supply Svcs              | 3      | 3                     | 10         |
| 737      | Comp Prog, Data Proc, Etc          | 4      | 6                     | 3          |
| 738      | Misc Business Svcs                 | 5      | 4                     | 6          |
| 75       | Auto Repair Svcs And Repair        | 6      | 5                     | 3          |
| 76       | Misc Repair Svcs                   | 2      | 1                     | 1          |
| 78,79,84 | Amusement And Rec Svcs             | 4      | 5                     | 4          |
| 80       | Health Services                    | 21     | 9                     | 9          |
| 81       | Legal Services                     | 15     | 19                    | 12         |
| 823      | Selctd Educational Svcs            | 1      | 1                     | 1          |
| 86       | Social Services                    | 2      | 0                     | 1          |
| 87       | Eng, Acct, Research Mgmt           | 17     | 25                    | 21         |
| 871      | Eng Architctrl Surv Svcs           | 5      | 12                    | 10         |
| 872      | Acct, Aud, And Bkpp Svcs           | 4      | 5                     | 4          |
| 873      | Resrch Devl Testing Serv           | 1      | 1                     | 1          |
| 874      | Mgmt And Pub Relation Svcs         | 6      | 7                     | 6          |
| 89       | Services N.E.C.                    | 1      | 1                     | 1          |
|          | TOTAL                              | 100    | 100                   | 100        |

Source: Department of City Planning  
U.S. Department of Commerce, Bureau of the Census

billion (1982 dollars). The industry groups with the highest percentages of the total services receipts were Business Services (28%), Legal Services (16%), and Engineering, architecture and surveying (14%).

The 1987 data shown on Table 3.3.13 show industry groups in more detail than was shown for 1982. Some of the SIC codes changed between 1982 and 1987, notably Engineering and Accounting, making comparisons imprecise. In 1987 there were about 10,500 establishments which employed about 140,000 people and had annual receipts of \$8.8 billion (1987 dollars). The industry groups with the highest percentages of total services receipts were Engineering, accounting, research, management (25%), Business Services (22%), and Legal Services (19%).

Table 3.3.14 shows service establishments with no employees, generally sole proprietorships. In 1987, there were about 26,000 such establishments with receipts of \$715 million. Twenty-nine percent of these establishments provided Business services, and 17% provided Engineering, accounting, research, management services.

**Table 3.3.14**

SERVICE INDUSTRIES, NON EMPLOYER STATISTICS, 1987

| SIC      | INDUSTRIES                        | ESTAB.<br>(Number) | RECEIPTS<br>(\$1000) | ESTAB.<br>Percent | RECEIPTS<br>Percent |
|----------|-----------------------------------|--------------------|----------------------|-------------------|---------------------|
| 70       | Hotels, Rooming Houses, Etc       | 0                  | 15,728               | 0                 | 2                   |
| 72       | Personal Services                 | 3,967              | 86,476               | 15                | 12                  |
| 73       | Business Services                 | 7,661              | 185,606              | 29                | 26                  |
| 75       | Automotive Repair, Services Etc   | 318                | 15,008               | 1                 | 2                   |
| 76       | Miscellaneous Repair Services     | 393                | 9,850                | 2                 | 1                   |
| 78,79,84 | Amusement And Recreation Services | 2,539              | 52,744               | 10                | 7                   |
| 80       | Health Services                   | 2,775              | 107,771              | 11                | 15                  |
| 81       | Legal Services                    | 1,358              | 57,827               | 5                 | 8                   |
| 823,4,9  | Selected Educational Services     | 741                | 9,544                | 3                 | 1                   |
| 83       | Social Services                   | 789                | 12,225               | 3                 | 2                   |
| 87       | Eng, Acct, Resrch, Mgmt Svcs      | 4,532              | 115,171              | 17                | 16                  |
| 89       | Service n.e.c.                    | 1,017              | 46,693               | 4                 | 7                   |
| TOTAL    |                                   | 26,090             | 714,643              | 100               | 100                 |

Source: Department of City Planning  
U.S. Department of Commerce, Bureau of the Census

### 3.3.2.3 Wholesale Trade Revenues

Tables 3.3.15 and 3.3.16 describe wholesale trade establishments in 1982 and 1987. In 1982 there were 2,000 wholesale establishments with 23,000 employees and annual sales of \$13.4 billion. Fifty-six percent of these establishments dealt with durable goods, and the remaining 44% with nondurable goods. Forty-seven percent of the sales volume was generated by establishments dealing in durable goods, and 53% by establishments dealing in nondurable goods.

By 1987, the number of establishments had increased to 2,300, the number of employees to 28,000, and the annual sales to \$13.9 billion (1987 dollars). The distribution of establishments between durable and nondurable goods remained similar. However, the share of annual sales generated by establishments which deal in durable goods increased from 47% to 53%, while the share generated by establishments which deal in nondurable goods decreased from 53% to 47%.

#### WHOLESALE TRADE, PAYROLL EMPLOYER STATISTICS, 1982

| SIC | INDUSTRIES       | ESTAB. | SALES (\$1,000) | EMPLOYMENT |
|-----|------------------|--------|-----------------|------------|
| 50  | Durable goods    | 1,137  | 6,248,243       | 13,274     |
| 51  | Nondurable goods | 891    | 7,177,392       | 10,128     |
|     | TOTAL            | 2,028  | 13,425,635      | 23,402     |

**Table 3.3.15**

#### WHOLESALE TRADE, PAYROLL EMPLOYER STATISTICS, 1982 Percentage distribution by Industry Groups

| SIC | INDUSTRIES       | ESTAB. | SALES | EMPLOYMENT |
|-----|------------------|--------|-------|------------|
| 50  | Durable goods    | 56     | 47    | 57         |
| 51  | Nondurable goods | 44     | 53    | 43         |
|     | TOTAL            | 100    | 100   | 100        |

**Table 3.3.16**

#### WHOLESALE TRADE, PAYROLL EMPLOYER STATISTICS, 1987

| SIC | INDUSTRIES       | ESTAB. | SALES (\$1,000) | EMPLOYMENT |
|-----|------------------|--------|-----------------|------------|
| 50  | Durable goods    | 1,299  | 7,441,156       | 16,257     |
| 51  | Nondurable goods | 958    | 6,502,276       | 11,874     |
|     | TOTAL            | 2,257  | 13,943,432      | 28,131     |

#### WHOLESALE TRADE, PAYROLL EMPLOYER STATISTICS, 1987 Percentage distribution by Industry Groups

| SIC | INDUSTRIES       | ESTAB. | SALES | EMPLOYMENT |
|-----|------------------|--------|-------|------------|
| 50  | Durable goods    | 58     | 53    | 58         |
| 51  | Nondurable goods | 42     | 47    | 42         |
|     | TOTAL            | 100    | 100   | 100        |

Source: Department of City Planning  
U.S. Department of Commerce, Bureau of the Census

### 3.3.2.4 Retail Trade Revenues

Tables 3.3.17 and 3.3.18 describe retail trade establishments with employees in 1982 and 1987. Table 3.3.19 describes sales tax permits and taxable sales in 1990.

In 1982 there were 5,900 retail establishments with 60,000 employees and annual sales of \$4 billion (1982 dollars). Two categories of establishments, Eating and drinking places and Food stores, each commanded 19% of the total sales.

In 1987 there were 6,900 retail establishments with 75,000 employees and annual sales of \$5.5 billion (1987 dollars). By 1987 Eating and drinking establishments had increased their share of the total retail sales to 20%, and the share captured by Food stores declined to 18%.

**Table 3.3.17**

RETAIL, PAYROLL EMPLOYER STATISTICS, 1982

| SIC        | Business                             | ESTAB. | SALES<br>(\$1,000) | EMPLOYMENT |
|------------|--------------------------------------|--------|--------------------|------------|
| 52         | Building materials, hardware, garden | 100    | 99,694             | 947        |
| 53         | General merchandise group stores     | 87     | 420,935            | 4,757      |
| 54         | Food stores                          | 817    | 790,841            | 7,157      |
| 55 ex. 554 | Automotive dealers                   | 110    | 454,344            | 2,154      |
| 554        | Gasoline service stations            | 234    | 218,574            | 1,673      |
| 56         | Apparel and accessory stores         | 609    | 374,055            | 5,100      |
| 57         | Furniture, home furnishings & equip. | 381    | 199,599            | 1,963      |
| 58         | Eating and drinking places           | 2,090  | 792,607            | 27,356     |
| 591        | Drug and proprietary stores          | 171    | 134,551            | 1,459      |
| 59 ex.591  | Miscellaneous retail stores          | 1,284  | 595,552            | 7,619      |
| TOTAL      |                                      | 5,883  | 4,080,752          | 60,185     |

RETAIL, PAYROLL EMPLOYER STATISTICS, 1982

Percentage Distribution by Industry Groups

| SIC        | Business                             | ESTABLISH. | SALES | EMPLOYMENT |
|------------|--------------------------------------|------------|-------|------------|
| 52         | Building materials, hardware, garden | 2          | 2     | 2          |
| 53         | General merchandise group stores     | 1          | 10    | 8          |
| 54         | Food stores                          | 14         | 19    | 12         |
| 55 ex. 554 | Automotive dealers                   | 2          | 11    | 4          |
| 554        | Gasoline service stations            | 4          | 5     | 3          |
| 56         | Apparel and accessory stores         | 10         | 9     | 8          |
| 57         | Furniture, home furnishings & equip. | 6          | 5     | 3          |
| 58         | Eating and drinking places           | 36         | 19    | 45         |
| 591        | Drug and proprietary stores          | 3          | 3     | 2          |
| 59 ex.591  | Miscellaneous retail stores          | 22         | 15    | 13         |
| TOTAL      |                                      | 100        | 100   | 100        |

Source: Department of City Planning  
U.S. Department of Commerce, Bureau of the Census

## RETAIL PAYROLL EMPLOYER STATISTICS, 1987

Table 3.3.18

| SIC        | Business                             | SALES  |           |            |
|------------|--------------------------------------|--------|-----------|------------|
|            |                                      | ESTAB. | (\$1,000) | EMPLOYMENT |
| 52         | Building materials, hardware, garden | 123    | 185,225   | 1,299      |
| 53         | General merchandise group stores     | 72     | 573,818   | 4,982      |
| 54         | Food stores                          | 999    | 978,908   | 9,272      |
| 55 ex. 554 | Automotive dealers                   | 117    | 523,885   | 2,481      |
| 554        | Gasoline service stations            | 192    | 205,324   | 1,515      |
| 56         | Apparel and accessory stores         | 780    | 504,506   | 5,638      |
| 57         | Furniture, home furnishings & equip. | 439    | 323,583   | 2,941      |
| 58         | Eating and drinking places           | 2,572  | 1,118,844 | 35,459     |
| 591        | Drug and proprietary stores          | 156    | 202,445   | 1,670      |
| 59 ex.591  | Miscellaneous retail stores          | 1,434  | 896,449   | 9,476      |
| TOTAL      |                                      | 6,884  | 5,512,987 | 74,733     |

## RETAIL TRADE, PAYROLL EMPLOYER STATISTICS, 1987

Percentage Distribution by Industry Groups

| SIC        | Business                             | ESTAB. | SALES | EMPLOYMENT |
|------------|--------------------------------------|--------|-------|------------|
| 52         | Building materials, hardware, garden | 2      | 3     | 2          |
| 53         | General merchandise group stores     | 1      | 10    | 7          |
| 54         | Food stores                          | 15     | 18    | 12         |
| 55 ex. 554 | Automotive dealers                   | 2      | 10    | 3          |
| 554        | Gasoline service stations            | 3      | 4     | 2          |
| 56         | Apparel and accessory stores         | 11     | 9     | 8          |
| 57         | Furniture, home furnishings & equip. | 6      | 6     | 4          |
| 58         | Eating and drinking places           | 37     | 20    | 47         |
| 591        | Drug and proprietary stores          | 2      | 4     | 2          |
| 59 ex.591  | Miscellaneous retail stores          | 21     | 16    | 13         |
| TOTAL      |                                      | 100    | 100   | 100        |

Source: Department of City Planning  
 U.S. Department of Commerce, Bureau of the Census

### 3.3.2.5 Taxable Sales

Sales tax permits are issued by the State of California Board of Equalization. The number of sales tax permits represents the number of businesses operated by all manufacturers, wholesalers, and retailers of tangible personal property except those dealing solely in nontaxable commodities. Permits are tabulated twice a year, January 1 and July 1. Sales tax data show the volume of taxable sales only; they do not give any information on sales, such as food for home consumption, which are not subject to sales tax.

The Board of Equalization makes the following observations about these data:

Total taxable transactions do not necessarily indicate the gross sales of stores dealing with taxable items. Only sales subject to sales tax are tabulated; excluded are sales for resale, sales of nontaxable items such as food for home consumption and prescription medicines, and taxable sales disclosed by board audits.

Some businesses dealing primarily in nontaxable activities, such as services, manufacturing, contracting, or wholesaling, either sell some merchandise that is subject to sales tax or use some items that were purchased ex-tax and on which use tax must be paid. Such transactions are included in the tabulations.

Data are compiled by type of store but cannot be broken down by commodity.

Business are classified by their principal line of merchandise or service.\*

In 1990, over 30,000 sales tax permits resulted in total taxable sales in San Francisco of \$8.6 billion. Of these total sales, 61% corresponded to retail stores, 9% to business and personal services, and 30% to other outlets. Business and personal services (business codes 70 to 73) include hotels, motels, repair shops, etc. "All Other Outlets" includes non-store retailers (mobile ice cream vendors, vending machines, sales by telephone); public utilities, government agencies, educational institutions, health services, construction contractors, wholesale stores, advertising agencies, real estate agencies, etc.

The types of retail stores with more than \$1 billion each in taxable transactions are specialty stores (office, store, and school supplies; jewelry; and others), and the eating and drinking group.

## TAXABLE SALES AND SALES TAX PERMITS BY TYPE OF BUSINESS, 1990

Table 3.3.19

| Type of Business                      | Permits       | Taxable transactions<br>(by \$1,000) |
|---------------------------------------|---------------|--------------------------------------|
| Apparel stores                        | 1,145         | 575,246                              |
| General merchandise stores            | 142           | 669,667                              |
| Drug stores                           | 145           | 138,807                              |
| Food stores                           | 1,367         | 303,610                              |
| Packaged liquor stores                | 141           | 56,582                               |
| Eating and drinking places            | 3,191         | 1,098,935                            |
| Home furnishings and appliances       | 641           | 266,975                              |
| Building material and farm implements | 208           | 209,887                              |
| Auto dealers and auto supplies        | 153           | 316,819                              |
| Service stations                      | 178           | 301,088                              |
| Other retail stores                   | 3,798         | 1,343,969                            |
| Retail Stores Totals                  | 11,109        | 5,281,585                            |
| Business and Personal Service         | 3,438         | 731,385                              |
| All Other Outlets                     | 15,569        | 2,583,484                            |
| <b>Totals All Outlets</b>             | <b>30,116</b> | <b>8,596,454</b>                     |

## TAXABLE SALES AND SALES TAX PERMITS BY TYPE OF BUSINESS, 1990

Percentage distribution by type of business

| Type of Business                      | Permits | Taxable transactions |
|---------------------------------------|---------|----------------------|
| Apparel stores                        | 10      | 11                   |
| General merchandise stores            | 1       | 13                   |
| Drug stores                           | 1       | 3                    |
| Food stores                           | 12      | 6                    |
| Packaged liquor stores                | 1       | 1                    |
| Eating and drinking places            | 29      | 21                   |
| Home furnishings and appliances       | 6       | 5                    |
| Building material and farm implements | 2       | 4                    |
| Auto dealers and auto supplies        | 1       | 6                    |
| Service stations                      | 2       | 6                    |
| Other retail stores                   | 34      | 3                    |
| Retail Stores Totals                  | 100     | 100                  |

Source: Department of City Planning  
California State Board of Equalization

### **3.3.3 CITY REVENUES AND EXPENDITURES**

The data in this section are from the *Comprehensive Annual Financial Report for the City and County of San Francisco*, prepared by the Office of the Controller.

These tables include data concerning the General Fund, Special Revenue Funds, and Debt Service Funds. The General Fund accounts for resources that are traditionally associated with governments and that are not required to be accounted for in another fund. Special Revenue Funds are used to account for the proceeds of specific revenue sources (other than expendable trusts or major capital projects) that are legally restricted to expenditures for specified purposes. Debt Service Funds account for the accumulation of property taxes and other revenue for periodic payment of interest and principal of general obligation and certain lease revenue bonds and related authorized costs.

Other City funds not included in these tables are Capital Project Funds, the Proprietary Funds which consist of enterprise and internal service funds and Fiduciary Funds which consist of pension trust and nonexpendable trust, expendable, and agency trust funds. These are funds whose uses are much more restricted than those which are included.

#### **3.3.3.1 City Revenues**

The Annual Financial Report for 1990 includes a table of General Revenues by Source, which shows a total revenue of \$1.5 billion. The major sources are property taxes (\$458 million), and grants and subventions (\$444 million). These two together represent more than 61 percent of the total revenues. The third and fourth largest are other local taxes (16 percent) and business taxes (10 percent). Charges for services; licenses, fines and penalties; interest and investment earnings; and other add the remaining 13 percent.

These revenue data adjusted by inflation (1981 dollar value) total \$1.035 billion for 1990, an increase of 25 percent since 1981. During this period, 1984 showed the only decline (9.2 percent), mainly due to a reduction of grants and subventions. Over the 1980s, grants and subventions have declined from 40 percent to 30 percent of the total budget. This decline has

**Table 3.3.20**

GENERAL REVENUES BY SOURCE-CONSTANT DOLLAR VALUE(1)(2)  
1981-1990 Fiscal Years, (In \$1000)

| Fiscal Year | Property Taxes | Business Taxes | Other Local Taxes |                    | Grants & Subventio | Licences | Interest & Fines & Investment | Charges for Service | Other     | Total |
|-------------|----------------|----------------|-------------------|--------------------|--------------------|----------|-------------------------------|---------------------|-----------|-------|
|             |                |                | Local             | Grants & Subventio |                    |          |                               |                     |           |       |
| 1981        | 186,415        | 58,773         | 125,872           | 329,786            | 28,872             | 33,192   | 58,230                        | 1,385               | 822,525   |       |
| 1982        | 189,931        | 95,898         | 146,949           | 293,077            | 28,490             | 30,363   | 77,356                        | 10,948              | 873,032   |       |
| 1983        | 211,856        | 91,544         | 129,540           | 274,673            | 27,465             | 45,529   | 86,689                        | 9,338               | 876,634   |       |
| 1984        | 213,865        | 86,234         | 130,849           | 234,434            | 26,856             | 38,667   | 57,973                        | 7,375               | 796,253   |       |
| 1985        | 239,026        | 79,535         | 141,367           | 244,295            | 24,594             | 30,986   | 60,049                        | 5,047               | 824,899   |       |
| 1986        | 266,409        | 90,538         | 150,293           | 252,376            | 29,911             | 30,076   | 64,249                        | 5,571               | 889,423   |       |
| 1987        | 280,561        | 89,988         | 159,771           | 239,620            | 31,365             | 23,051   | 75,375                        | 7,457               | 907,188   |       |
| 1988        | 294,401        | 92,477         | 168,461           | 268,053            | 34,869             | 19,833   | 60,550                        | 8,783               | 947,427   |       |
| 1989        | 300,960        | 104,726        | 168,667           | 266,311            | 37,078             | 22,316   | 59,820                        | 10,190              | 970,068   |       |
| 1990        | 322,670        | 107,305        | 161,356           | 312,771            | 35,445             | 22,350   | 64,099                        | 9,017               | 1,035,013 |       |

Percentage Distribution By Revenue Source

| Fiscal Year | Property Taxes | Business Taxes | Other Local Taxes |                    | Grants & Subventio | Licences | Interest & Fines & Investment | Charges for Service | Other | Total |
|-------------|----------------|----------------|-------------------|--------------------|--------------------|----------|-------------------------------|---------------------|-------|-------|
|             |                |                | Local             | Grants & Subventio |                    |          |                               |                     |       |       |
| 1981        | 23             | 7              | 15                | 40                 | 4                  | 4        | 7                             | 0                   | 100   |       |
| 1982        | 22             | 11             | 17                | 34                 | 3                  | 4        | 9                             | 1                   | 100   |       |
| 1983        | 24             | 10             | 15                | 31                 | 3                  | 5        | 10                            | 1                   | 100   |       |
| 1984        | 27             | 11             | 16                | 29                 | 3                  | 5        | 7                             | 1                   | 100   |       |
| 1985        | 29             | 10             | 17                | 30                 | 3                  | 4        | 7                             | 1                   | 100   |       |
| 1986        | 30             | 10             | 17                | 28                 | 3                  | 3        | 7                             | 1                   | 100   |       |
| 1987        | 31             | 10             | 18                | 26                 | 4                  | 3        | 8                             | 1                   | 100   |       |
| 1988        | 31             | 10             | 18                | 28                 | 4                  | 2        | 6                             | 1                   | 100   |       |
| 1989        | 31             | 11             | 17                | 28                 | 4                  | 2        | 6                             | 1                   | 100   |       |
| 1990        | 31             | 10             | 16                | 30                 | 3                  | 2        | 6                             | 1                   | 100   |       |

Percentage Change

| Fiscal Year | Property Taxes | Business Taxes | Other Local Taxes |                    | Grants & Subventio | Licences | Interest & Fines & Investment | Charges for Service | Other | Total |
|-------------|----------------|----------------|-------------------|--------------------|--------------------|----------|-------------------------------|---------------------|-------|-------|
|             |                |                | Local             | Grants & Subventio |                    |          |                               |                     |       |       |
| -1981/1982  | 2              | 63             | 17                | -11                | -1                 | -9       | 33                            | 691                 | 6     |       |
| -1982/1983  | 12             | -5             | -12               | -6                 | -4                 | 50       | 12                            | -15                 | 0     |       |
| -1983/1984  | 1              | -6             | 1                 | -15                | -2                 | -15      | -33                           | -21                 | -9    |       |
| -1984/1985  | 12             | -8             | 8                 | 4                  | -8                 | -20      | 4                             | -32                 | 4     |       |
| -1985/1986  | 12             | 14             | 6                 | 3                  | 22                 | -3       | 7                             | 10                  | 8     |       |
| -1986/1987  | 5              | -1             | 6                 | -5                 | 5                  | -23      | 17                            | 34                  | 2     |       |
| -1987/1988  | 5              | 3              | 5                 | 12                 | 11                 | -14      | -20                           | 18                  | 4     |       |
| -1988/1989  | 2              | 13             | 0                 | -1                 | 6                  | 13       | -1                            | 16                  | 2     |       |
| -1989/1990  | 7              | 3              | -4                | 17                 | -4                 | 0        | 7                             | -12                 | 7     |       |

(1) Includes General, Special Revenue and Dept Service Funds.

(2) The information for the years 1982 through 1990 has been adjusted to the 1981 value of the dollar, using the average Consumer Price Index-Urban for each year.

Source: Department of City Planning  
Office of the Controller

GENERAL REVENUES BY SOURCE (1)  
1990 Fiscal Year, (In \$1000, Unadjusted)

|         | Property Taxes | Business Taxes | Other Local Taxes |                    | Grants & Subventio | Licences | Interest & Fines & Investment | Charges for Service | Other     | Total |
|---------|----------------|----------------|-------------------|--------------------|--------------------|----------|-------------------------------|---------------------|-----------|-------|
|         |                |                | Local             | Grants & Subventio |                    |          |                               |                     |           |       |
| Total   | 457,867        | 152,265        | 228,964           | 443,821            | 50,296             | 31,714   | 90,956                        | 12,795              | 1,468,678 |       |
| Percent | 31             | 10             | 16                | 30                 | 3                  | 2        | 6                             | 1                   | 100       |       |

(1) Includes General, Special Revenue and Dept Service Funds.

Source: Department of City Planning  
Office of the Controller

**Table 3.3.21**

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been offset by the increase in property taxes of about 80 percent since 1981. Property taxes contributed 23 percent of the total budget in 1981; this share grew to 31 percent in 1990.

### **3.3.3.2 City Expenditures**

For the year ended June 30, 1990, total City and County expenditures for the city were \$1.263 billion. Of this total expenditure, 36% went to public protection, 22% to human welfare and neighborhood development, 13% to community health, and the remaining 30% to general administration and finance; culture and recreation; public works, transportation, and commerce; and debt service.

Looking at expenditure figures in constant dollar value (adjusted to the 1981 dollar value), there was a 35% increase in expenditures from 1981 to 1990. During this 10 year period, 1985 and 1987 had the largest increases of 8.2% each year. The function that showed the largest increase was debt service, which more than doubled. Human welfare and neighborhood development is the only function to experience a decrease during the 1980s.

GENERAL GOVERNMENTAL EXPENDITURES BY FUNCTION CONSTANT DOLLAR VALUE(1)(2)  
1981-1990 Fiscal Years, (\$1,000)

Table 3.3.22

| Fiscal Year | Pub Works, Protection | Human Transp. & Commrc | Welfare & Communit Neigh.Devt | Culture & Health | Administ. Recreation & Finance | Gral. Service | Debt   | Total   |
|-------------|-----------------------|------------------------|-------------------------------|------------------|--------------------------------|---------------|--------|---------|
| 1981        | 235,222               | 33,755                 | 196,757                       | 80,865           | 42,376                         | 48,979        | 17,499 | 655,453 |
| 1982        | 275,752               | 43,521                 | 181,163                       | 99,002           | 47,968                         | 64,061        | 16,401 | 727,868 |
| 1983        | 271,168               | 41,247                 | 177,187                       | 104,340          | 62,626                         | 78,537        | 21,396 | 756,501 |
| 1984        | 292,441               | 45,216                 | 168,678                       | 71,910           | 63,605                         | 62,449        | 23,223 | 727,522 |
| 1985        | 307,684               | 47,218                 | 172,333                       | 83,474           | 67,430                         | 87,585        | 21,691 | 787,415 |
| 1986        | 311,048               | 46,588                 | 171,870                       | 91,373           | 70,129                         | 67,516        | 21,256 | 779,780 |
| 1987        | 324,958               | 51,971                 | 181,943                       | 97,244           | 76,341                         | 91,340        | 19,979 | 843,776 |
| 1988        | 322,670               | 51,166                 | 181,117                       | 102,068          | 77,422                         | 96,375        | 24,111 | 854,929 |
| 1989        | 309,744               | 46,108                 | 180,460                       | 100,387          | 74,422                         | 98,608        | 23,806 | 833,535 |
| 1990        | 318,235               | 53,309                 | 193,845                       | 115,413          | 82,433                         | 90,601        | 36,226 | 890,082 |

Percentage Distribution By Function

| Fiscal Year | Pub Works, Protection | Human Transp. & Commrc | Welfare & Communit Neigh.Devt | Culture & Health | Administ. Recreation & Finance | Gral. Service | Debt | Total |
|-------------|-----------------------|------------------------|-------------------------------|------------------|--------------------------------|---------------|------|-------|
| 1981        | 36                    | 5                      | 30                            | 12               | 7                              | 8             | 3    | 100   |
| 1982        | 38                    | 6                      | 25                            | 14               | 7                              | 9             | 2    | 100   |
| 1983        | 36                    | 6                      | 23                            | 14               | 8                              | 10            | 3    | 100   |
| 1984        | 40                    | 6                      | 23                            | 10               | 9                              | 9             | 3    | 100   |
| 1985        | 39                    | 6                      | 22                            | 11               | 9                              | 11            | 3    | 100   |
| 1986        | 40                    | 6                      | 22                            | 12               | 9                              | 9             | 3    | 100   |
| 1987        | 39                    | 6                      | 22                            | 12               | 9                              | 11            | 2    | 100   |
| 1988        | 38                    | 6                      | 21                            | 12               | 9                              | 11            | 3    | 100   |
| 1989        | 37                    | 6                      | 22                            | 12               | 9                              | 12            | 3    | 100   |
| 1990        | 36                    | 6                      | 22                            | 13               | 9                              | 10            | 4    | 100   |

Percentage Change

| Fiscal Year | Pub Works, Protection | Human Transp. & Commrc | Welfare & Communit Neigh.Devt | Culture & Health | Administ. Recreation & Finance | Gral. Service | Debt | Total |
|-------------|-----------------------|------------------------|-------------------------------|------------------|--------------------------------|---------------|------|-------|
| 1981-1982   | 17                    | 29                     | -8                            | 22               | 13                             | 31            | -6   | 11    |
| 1982-1983   | -2                    | -5                     | -2                            | 5                | 31                             | 23            | 31   | 4     |
| 1983-1984   | 8                     | 10                     | -5                            | -31              | 2                              | -21           | 9    | -4    |
| 1984-1985   | 5                     | 4                      | 2                             | 16               | 6                              | 40            | -7   | 8     |
| 1985-1986   | 1                     | -1                     | -0                            | 10               | 4                              | -23           | -2   | -1    |
| 1986-1987   | 5                     | 12                     | 6                             | 6                | 9                              | 35            | -6   | 8     |
| 1987-1988   | -1                    | -2                     | -1                            | 5                | 1                              | 6             | 21   | 1     |
| 1988-1989   | -4                    | -10                    | -0                            | -2               | -4                             | 2             | -1   | -3    |
| 1989-1990   | 3                     | 16                     | 7                             | 15               | 11                             | -8            | 52   | 7     |

(1) Includes General, Special Revenue and Dept Service Funds.

(2) Information of the years 1982 through 1990 has been adjusted to the 1981 value of the dollar, using the average Consumer Price Index-Urban for each year.

Source: Department of City Planning  
Office of the Controller

GENERAL GOVERNMENTAL EXPENDITURES BY FUNCTION (1)  
1990 Fiscal Year, (\$1,000, Unadjusted)

Table 3.3.23

|         | Pub Works, Protection | Human Transp. & Commrc | Welfare & Communit Neigh.Devt | Culture & Health | Administ. Recreation & Finance | Gral. Service | Debt   | Total     |
|---------|-----------------------|------------------------|-------------------------------|------------------|--------------------------------|---------------|--------|-----------|
| Total   | 451,575               | 75,645                 | 275,066                       | 163,771          | 116,972                        | 128,562       | 51,405 | 1,262,996 |
| Percent | 36                    | 6                      | 22                            | 13               | 9                              | 10            | 4      | 100       |

(1) Includes General, Special Revenue and Dept Service Funds.

Source: Department of City Planning  
Office of the Controller

## 3.4 BUILDING AND LAND USE

### 3.4.1 BUILDING PERMIT APPLICATIONS: 1990

The data in this section are from the Bureau of Building Inspection (BBI). They include the number of building permit applications processed in 1990, the cost of projects associated with the permits, and the status of the application. These indicators are presented by C&I district and Land Use activity. The C&I district and Land Use Activity classifications are defined in the Introduction, under Data Formats, page 3. Construction work in the city consists of construction of new buildings, demolition, and alterations to existing structures. The number of building permit applications indicates the number of projects and/or sites. The construction cost measures the size of those projects. It is important to look at both indicators because in some cases applications indicate only a nominal construction cost, for example when an application is required to change the permitted use of a property but no construction is involved. Construction cost as presented in the following tables is the estimated cost of construction for each application and is reviewed by BBI. Mixed use projects are categorized according to the predominant use.

The different application statuses used by BBI are grouped into four categories:

- Approved: refers to all applications that have been approved whether or not the permit has been issued. (It does not include projects where construction is complete.)
- Cancelled: includes applications that have been cancelled, withdrawn, revoked, or disapproved. Disapproved is a very small percentage in this group.
- Completed: includes applications where the authorized construction work has been completed.
- Other : includes applications which have not yet been acted upon, or which have been abandoned, reinstated, appealed, or with no information.

#### 3.4.1.1 Number and construction cost of building permits in the C&I districts

As shown on Tables 3.4.1 and 3.4.2, in 1990, there were about 28,700 building permit applications with a total construction cost of about \$1.2 billion citywide. These data show that the geography of applications varies substantially from the geography of the estimated construction cost volume. The highest concentration of construction dollars is in the Financial dis-

trict, while the highest concentration of building permit applications is in the West side of the city, where most applications are for residential projects, including remodelings. The Financial District contains 28% of the construction cost, although it only represents 9% of the total number of applications. This shows that projects in the Financial District are much larger in scale, with an average cost of \$135,000. Sixty-seven percent of the total number of applications comes from the three districts on the west side of the city; 41% from the South West

BUILDING APPLICATIONS BY C&I DISTRICT AND LAND USE ACTIVITIES  
1990

|              | Office | Retail | Industrial | Hotel | Cult./Instl. | Residential | Other | TOTAL  |
|--------------|--------|--------|------------|-------|--------------|-------------|-------|--------|
| Financial    | 1,732  | 279    | 5          | 44    | 10           | 196         | 265   | 2,531  |
| Civic Center | 89     | 123    | 12         | 49    | 33           | 314         | 96    | 716    |
| Chinatown    | 57     | 76     | 1          | 11    | 10           | 429         | 85    | 669    |
| Van Ness     | 58     | 117    | 7          | 10    | 12           | 595         | 55    | 854    |
| S. of Market | 450    | 356    | 265        | 17    | 32           | 695         | 340   | 2,155  |
| Mission      | 51     | 154    | 24         | 1     | 25           | 1,380       | 122   | 1,757  |
| N. Central   | 73     | 204    | 5          | 10    | 62           | 3,540       | 298   | 4,192  |
| N. West      | 44     | 121    | 5          | 0     | 35           | 3,011       | 162   | 3,378  |
| S. West      | 153    | 428    | 52         | 5     | 99           | 9,935       | 994   | 11,666 |
| Bay View     | 49     | 49     | 67         | 0     | 10           | 515         | 58    | 748    |
| TOTAL        | 2,756  | 1,907  | 443        | 147   | 328          | 20,610      | 2,475 | 28,666 |

BUILDING APPLICATIONS BY C&I DISTRICT AND LAND USE ACTIVITIES  
Percentage distribution by C&I District  
1990

|              | Office | Retail | Industrial | Hotel | Cult./Instl. | Residential | Other | TOTAL |
|--------------|--------|--------|------------|-------|--------------|-------------|-------|-------|
| Financial    | 63     | 15     | 1          | 30    | 3            | 1           | 11    | 9     |
| Civic Center | 3      | 6      | 3          | 33    | 10           | 2           | 4     | 3     |
| Chinatown    | 2      | 4      | 0          | 7     | 3            | 2           | 3     | 2     |
| Van Ness     | 2      | 6      | 2          | 7     | 4            | 3           | 2     | 3     |
| S. of Market | 16     | 19     | 60         | 12    | 10           | 3           | 14    | 8     |
| Mission      | 2      | 8      | 5          | 1     | 8            | 7           | 5     | 6     |
| N. Central   | 3      | 11     | 1          | 7     | 19           | 17          | 12    | 15    |
| N. West      | 2      | 6      | 1          | 0     | 11           | 15          | 7     | 12    |
| S. West      | 6      | 22     | 12         | 3     | 30           | 48          | 40    | 41    |
| Bay View     | 2      | 3      | 15         | 0     | 3            | 3           | 2     | 3     |
| TOTAL        | 100    | 100    | 100        | 100   | 100          | 100         | 100   | 100   |

BUILDING APPLICATIONS BY C&I DISTRICT AND LAND USE ACTIVITIES  
Percentage distribution by Land Use Activities  
1990

|              | Office | Retail | Industrial | Hotel | Cult./Instl. | Residential | Other | TOTAL |
|--------------|--------|--------|------------|-------|--------------|-------------|-------|-------|
| Financial    | 68     | 11     | 0          | 2     | 0            | 8           | 10    | 100   |
| Civic Center | 12     | 17     | 2          | 7     | 5            | 44          | 13    | 100   |
| Chinatown    | 9      | 11     | 0          | 2     | 1            | 64          | 13    | 100   |
| Van Ness     | 7      | 14     | 1          | 1     | 1            | 70          | 6     | 100   |
| S. of Market | 21     | 17     | 12         | 1     | 1            | 32          | 16    | 100   |
| Mission      | 3      | 9      | 1          | 0     | 1            | 79          | 7     | 100   |
| N. Central   | 2      | 5      | 0          | 0     | 1            | 84          | 7     | 100   |
| N. West      | 1      | 4      | 0          | 0     | 1            | 89          | 5     | 100   |
| S. West      | 1      | 4      | 0          | 0     | 1            | 85          | 9     | 100   |
| Bay View     | 7      | 7      | 9          | 0     | 1            | 69          | 8     | 100   |
| TOTAL        | 10     | 7      | 2          | 1     | 1            | 72          | 9     | 100   |

Source: Department of City Planning  
Bureau of Building Inspection

Table 3.4.1

**Table 3.4.2**CONSTRUCTION COST OF BUILDING APPLICATIONS BY C&I DISTRICT AND LAND USE ACTIVITIES  
(\$1,000)  
1990

|              | Office         | Retail         | Industrial    | Hotel         | Cult./Instl   | Residential    | Other         | TOTAL            |
|--------------|----------------|----------------|---------------|---------------|---------------|----------------|---------------|------------------|
| Financial    | 226,859        | 84,069         | 108           | 6,985         | 13,513        | 8,094          | 2,666         | 342,297          |
| Civic Center | 14,650         | 4,559          | 112           | 2,981         | 20,392        | 12,838         | 107           | 56,639           |
| Chinatown    | 4,949          | 4,549          | 35            | 724           | 236           | 12,885         | 81            | 23,460           |
| Van Ness     | 1,863          | 6,673          | 71            | 162           | 3,832         | 66,995         | 108           | 79,704           |
| So. Market   | 86,359         | 10,359         | 13,135        | 1,425         | 31,640        | 59,401         | 2,169         | 204,488          |
| Mission      | 2,152          | 7,784          | 1,696         | 7             | 777           | 38,328         | 507           | 51,250           |
| N.Central    | 1,340          | 3,911          | 42            | 280           | 9,875         | 88,068         | 1,687         | 105,203          |
| N.West       | 2,078          | 2,404          | 498           | 0             | 1,253         | 59,386         | 751           | 66,370           |
| S.West       | 17,212         | 13,856         | 56,893        | 220           | 9,586         | 155,536        | 2,869         | 256,173          |
| Bay View     | 1,753          | 1,646          | 6,311         | 0             | 2,912         | 13,035         | 330           | 25,987           |
| <b>TOTAL</b> | <b>359,216</b> | <b>139,809</b> | <b>78,901</b> | <b>12,784</b> | <b>94,016</b> | <b>514,569</b> | <b>11,275</b> | <b>1,210,570</b> |

CONSTRUCTION COST OF BUILDING APPLICATIONS BY C&I DISTRICT AND LAND USE ACTIVITIES  
Percentage distribution by C&I District  
1990

|              | Office     | Retail     | Industrial | Hotel      | Cult./Instl | Residential | Other      | TOTAL      |
|--------------|------------|------------|------------|------------|-------------|-------------|------------|------------|
| Financial    | 63         | 60         | 0          | 55         | 14          | 2           | 24         | 28         |
| Civic Center | 4          | 3          | 0          | 23         | 22          | 2           | 1          | 5          |
| Chinatown    | 1          | 3          | 0          | 6          | 0           | 3           | 1          | 2          |
| Van Ness     | 1          | 5          | 0          | 1          | 4           | 13          | 1          | 7          |
| So. Market   | 24         | 7          | 17         | 11         | 34          | 12          | 19         | 17         |
| Mission      | 1          | 6          | 2          | 0          | 1           | 7           | 4          | 4          |
| N.Central    | 0          | 3          | 0          | 2          | 11          | 17          | 15         | 9          |
| N.West       | 1          | 2          | 1          | 0          | 1           | 12          | 7          | 5          |
| S.West       | 5          | 10         | 72         | 2          | 10          | 30          | 25         | 21         |
| Bay View     | 0          | 1          | 8          | 0          | 3           | 3           | 3          | 2          |
| <b>TOTAL</b> | <b>100</b> | <b>100</b> | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b>  | <b>100</b> | <b>100</b> |

CONSTRUCTION COST OF BUILDING APPLICATIONS BY C&I DISTRICT AND LAND USE ACTIVITIES  
Percentage distribution by Land Use Activities  
1990

|              | Office    | Retail    | Industrial | Hotel    | Cult./Instl | Residential | Other    | TOTAL      |
|--------------|-----------|-----------|------------|----------|-------------|-------------|----------|------------|
| Financial    | 66        | 25        | 0          | 2        | 4           | 2           | 1        | 100        |
| Civic Center | 26        | 8         | 0          | 5        | 37          | 23          | 0        | 100        |
| Chinatown    | 21        | 19        | 0          | 3        | 1           | 55          | 0        | 100        |
| Van Ness     | 2         | 8         | 0          | 0        | 5           | 84          | 0        | 100        |
| So. Market   | 42        | 5         | 6          | 1        | 15          | 29          | 1        | 100        |
| Mission      | 4         | 15        | 3          | 0        | 2           | 75          | 1        | 100        |
| N.Central    | 1         | 4         | 0          | 0        | 9           | 84          | 2        | 100        |
| N.West       | 3         | 4         | 1          | 0        | 2           | 89          | 1        | 100        |
| S.West       | 7         | 5         | 22         | 0        | 4           | 61          | 1        | 100        |
| Bay View     | 7         | 6         | 24         | 0        | 11          | 50          | 1        | 100        |
| <b>TOTAL</b> | <b>30</b> | <b>12</b> | <b>7</b>   | <b>1</b> | <b>8</b>    | <b>43</b>   | <b>1</b> | <b>100</b> |

Source: Department of City Planning  
Bureau of Building Inspection

district, 15% from North Central, and 12% from North West. The districts which accounted for the smallest percentage of applications were Civic Center, North Beach/Chinatown, Van Ness, and the Bay View district, each with less than 3% of the City total. After the Financial District, the second and third largest shares of the city-wide construction cost are in South West and South of Market with 21% and 17% respectively. The Districts showing the smallest volume of construction cost are Bay View and North Beach/Chinatown with 2% each.

### **3.4.1.2 Land Use Activities reflected in building permit applications**

As shown on Tables 3.4.1 and 3.4.2, the most significant Land Use activity, both in terms of number of applications and construction cost city-wide, is Residential Activity, with 72 percent of the total number of permit applications and 43 percent of construction cost. It is also the predominant Activity in terms of number of applications in every district except the Financial District. The other Land Use Activities (Office, Retail, Industrial, Cultural/Institutional, Hotel, Other), each consist of less than 10 percent of the total number of permit applications.

While Residential permits make up 72% of the total number of permits, they represent only 42% of the total construction cost. Office Activities represent less than 10% of the total number of applications, but 30% of the total construction cost. Retail is the third largest Land Use activity, both in terms of number and construction cost of permits, with 7% of the total number of permits and 12% of the total construction cost.

Office Activity is the most concentrated Land Use activity. Almost 80% of office applications and 87% of the total construction cost of office applications were located in just two districts, the Financial District and the South of Market. Industrial Activity is concentrated in the South of Market district, where almost 60% of all Industrial applications were located. An additional 15% of Industrial applications were located in the Bay View district. Residential applications are concentrated in South West district, where 48% of all residential permits applications were located. 80% of all residential permit applications were in three districts: South West, North West, and North Central. Cultural/Institutional and retail activities are the least concentrated activities, as reflected in the 1990 building permit applications. No district received more than 30% of the applications in either of these categories.

The pattern of distribution of construction cost between districts varies from the distribution of applications. For example, 15% of all retail applications were received in the Financial District, but these applications represented about 60% of the total construction cost of retail applications. This shows that the scale and expense of these retail projects was substantially more ambitious than retail projects elsewhere in the City, and may be more likely to involve new construction than alterations to existing buildings. While the Financial District and Civic Center had similar percentages of the total number of Hotel applications (30% and 33%, respectively), 55% of the total construction cost of hotel applications was for Financial District projects, and 23% for Civic Center projects.

### 3.4.1.3 Average Construction Cost

Table 3.4.3 shows the average construction cost of application by Land Use Activity and by C&I District. By Land Use Activity, Cultural/Institutional applications had the highest average cost of \$278,000. Average cost for Industrial and Office applications figure was the second and third highest with \$164,000 and \$130,000 respectively. Residential projects had the lowest average cost of \$24,000.

Not surprisingly, the districts with the bulk of the more expensive office and industrial projects have the highest average application costs. The Financial District shows the highest average of \$135,000 per project, followed by South of Market with \$95,000 per project, and Van Ness with \$93,000 per project. The lowest averages are found in the West Districts, where most of the residential projects were located.

**Table 3.4.3**

AVERAGE CONSTRUCTION COST BY BUILDING APPLICATIONS BY C&I DISTRICT 1990

|              | Construction Cost (\$1,000) Applications | Average Construction Cost/Application (\$1,000) |
|--------------|--|---|
| Financial    | 342,297                                  | 2,531   |
| Civic Center | 55,639                                   | 716   |
| Chinatown    | 23,460                                   | 669   |
| Van Ness     | 79,704                                   | 854   |
| S.of Market  | 204,488                                  | 2,155   |
| Mission      | 51,250                                   | 1,757   |
| N.Central    | 105,203                                  | 4,192   |
| N.West       | 66,370                                   | 3,378   |
| S.West       | 256,173                                  | 11,666  |
| Bay View     | 25,987                                   | 748   |
| <b>TOTAL</b> | <b>1,210,570</b>                         | <b>28,666</b>                                   |
|              |  | 42  |

AVERAGE CONSTRUCTION COST BY BUILDING APPLICATIONS BY LAND USE ACTIVITY 1990

|              | Construction Cost (\$1,000) Applications | Average Construction Cost/Application (\$1,000) |
|--------------|--|---|
| Office       | 357,463                                  | 2,756   |
| Retail       | 138,164                                  | 1,907   |
| Industrial   | 72,590                                   | 443   |
| Hotel        | 12,784                                   | 147   |
| Cult./Instl  | 91,103                                   | 328   |
| Residential  | 501,534                                  | 20,610  |
| Other        | 10,945                                   | 2,475   |
| <b>TOTAL</b> | <b>1,184,583</b>                         | <b>28,666</b>                                   |
|              |  | 41  |

Source: Department of City Planning  
Bureau of Building Inspection

### 3.4.1.4 Application Status

Application status gives an indication of the likelihood of projects applied for in any year to be carried out. During uncertain economic times we might expect to see an increase in projects withdrawn, or in projects which are approved, but never completed. The number of completed projects is also a more precise measure of the amount of money spent on construction in any year, and of the number of projects being readied for occupancy, than is the number of applications filed.

Application status also has an element of time. Successful projects move from one category to another over time. First they are approved, then they remain in that category for a period of time until construction is completed. This amount of time varies considerably depending on the complexity of the project and the diligence with which it is pursued, but the number and cost of projects at early stages in the process will indicate the amount of actual construction likely to occur in the near future.

In 1990, 45% of applications which passed through BBI were approved in the course of the year but not completed, 40% were completed, 15% were cancelled or in other categories. 56% of office applications were approved and 36% completed, while 40% of the residential applications were approved and 44% completed. This may be because less time typically elapses between when residential projects are approved and when they are completed.

Sixty-one percent of the total construction cost corresponded to approved applications, 12% to construction work completed, and 25% to "other" (which includes projects under review).

While Residential Activities represent the highest percentage of applications approved (64%), these same applications account for 37% of the construction cost, again reflecting the lower average cost of residential projects.

**Table 3.4.4**BUILDING APPLICATIONS BY APPLICATION DISPOSITION AND LAND USE ACTIVITY  
1990

|              | Office       | Retail       | Industrial | Hotel      | Cult./Instl | Residential   | Other        | TOTAL         |
|--------------|--------------|--------------|------------|------------|-------------|---------------|--------------|---------------|
| Approved     | 1532         | 851          | 234        | 84         | 175         | 8199          | 1804         | 12,879        |
| Cancelled+   | 980          | 706          | 145        | 38         | 83          | 9058          | 403          | 11,413        |
| Completed    | 136          | 186          | 27         | 13         | 24          | 1788          | 104          | 2,278         |
| Other        | 108          | 164          | 37         | 12         | 44          | 1565          | 166          | 2,096         |
| <b>TOTAL</b> | <b>2,756</b> | <b>1,907</b> | <b>443</b> | <b>147</b> | <b>326</b>  | <b>20,610</b> | <b>2,477</b> | <b>28,666</b> |

BUILDING APPLICATIONS BY APPLICATION DISPOSITION AND LAND USE ACTIVITY  
Percentage distribution by application disposition  
1990

|              | Office     | Retail     | Industrial | Hotel      | Cult./Instl | Residential | Other      | TOTAL      |
|--------------|------------|------------|------------|------------|-------------|-------------|------------|------------|
| Approved     | 56         | 45         | 53         | 57         | 54          | 40          | 73         | 45         |
| Cancelled+   | 36         | 37         | 33         | 26         | 25          | 44          | 16         | 40         |
| Completed    | 5          | 10         | 6          | 9          | 7           | 9           | 4          | 8          |
| Other        | 4          | 9          | 8          | 8          | 14          | 8           | 7          | 7          |
| <b>TOTAL</b> | <b>100</b> | <b>100</b> | <b>100</b> | <b>100</b> | <b>100</b>  | <b>100</b>  | <b>100</b> | <b>100</b> |

BUILDING APPLICATIONS BY APPLICATION DISPOSITION AND LAND USE ACTIVITY  
Percentage distribution by Land Use Activities  
1990

|              | Office    | Retail   | Industrial | Hotel    | Cult./Instl | Residential | Other    | TOTAL      |
|--------------|-----------|----------|------------|----------|-------------|-------------|----------|------------|
| Approved     | 12        | 7        | 2          | 1        | 1           | 64          | 14       | 100        |
| Cancelled+   | 9         | 6        | 1          | 0        | 1           | 79          | 4        | 100        |
| Completed    | 6         | 8        | 1          | 1        | 1           | 78          | 5        | 100        |
| Other        | 5         | 8        | 2          | 1        | 2           | 75          | 8        | 100        |
| <b>TOTAL</b> | <b>10</b> | <b>7</b> | <b>2</b>   | <b>1</b> | <b>1</b>    | <b>72</b>   | <b>9</b> | <b>100</b> |

Source: Department of City Planning  
Bureau of Building Department

CONSTRUCTION COST OF BUILDING APPLICATIONS BY APPLICATION DISPOSITION & LAND USE ACTIVITY  
(\$1,000)  
1990

|            | Office  | Retail  | Industrial | Hotel  | Cult./Instl | Residential | Other  | TOTAL     |
|------------|---------|---------|------------|--------|-------------|-------------|--------|-----------|
| Approved   | 242,052 | 91,943  | 68,833     | 8,025  | 43,718      | 272,313     | 7,513  | 734,407   |
| Cancelled+ | 59,530  | 13,839  | 1,651      | 627    | 1,171       | 69,914      | 2,794  | 149,527   |
| Completed  | 3,575   | 3,291   | 745        | 388    | 921         | 18,145      | 461    | 27,526    |
| Other      | 54,049  | 30,736  | 7,672      | 3,744  | 18,202      | 154,196     | 30,510 | 299,111   |
| TOTAL      | 359,216 | 139,809 | 78,901     | 12,784 | 64,013      | 514,569     | 41,278 | 1,210,570 |

CONSTRUCTION COST OF BUILDING APPLICATIONS BY APPLICATION DISPOSITION & LAND USE ACTIVITY  
Percentage distribution by application disposition  
1990

|            | Office | Retail | Industrial | Hotel | Cult./Instl | Residential | Other | TOTAL |
|------------|--------|--------|------------|-------|-------------|-------------|-------|-------|
| Approved   | 67     | 66     | 87         | 63    | 68          | 53          | 18    | 61    |
| Cancelled+ | 17     | 10     | 2          | 5     | 2           | 14          | 7     | 12    |
| Completed  | 1      | 2      | 1          | 3     | 1           | 4           | 1     | 2     |
| Other      | 15     | 22     | 10         | 29    | 28          | 30          | 74    | 25    |
| TOTAL      | 100    | 100    | 100        | 100   | 100         | 100         | 100   | 100   |

CONSTRUCTION COST OF BUILDING APPLICATIONS BY APPLICATION DISPOSITION & LAND USE ACTIVITY  
Percentage distribution by Land Use Activities  
1990

|            | Office | Retail | Industrial | Hotel | Cult./Instl | Residential | Other | TOTAL |
|------------|--------|--------|------------|-------|-------------|-------------|-------|-------|
| Approved   | 33     | 13     | 9          | 1     | 6           | 37          | 1     | 100   |
| Cancelled+ | 40     | 9      | 1          | 0     | 1           | 47          | 2     | 100   |
| Completed  | 13     | 12     | 3          | 1     | 3           | 66          | 2     | 100   |
| Other      | 18     | 10     | 3          | 1     | 6           | 52          | 10    | 100   |
| TOTAL      | 30     | 12     | 7          | 1     | 5           | 43          | 3     | 100   |

Source: Department of City Planning  
Bureau of Building Department

Table 3.4.5

**Table 3.4.6**BUILDING APPLICATIONS BY C&I DISTRICT AND APPLICATION STATUS  
1990

|              | Approved      | Cancelled+   | Completed     | Others       | TOTAL         |
|--------------|---------------|--------------|---------------|--------------|---------------|
| Financial    | 1,419         | 134          | 882           | 96           | 2,531         |
| Civic Center | 361           | 52           | 225           | 78           | 716           |
| Chinatown    | 291           | 80           | 251           | 47           | 669           |
| Van Ness     | 345           | 92           | 352           | 65           | 854           |
| S.of Market  | 1,197         | 124          | 672           | 162          | 2,156         |
| Mission      | 794           | 194          | 618           | 151          | 1,757         |
| N.Central    | 1,994         | 486          | 1,431         | 281          | 4,192         |
| N.West       | 1,171         | 444          | 1,541         | 222          | 3,378         |
| S.West       | 4,978         | 638          | 5,136         | 914          | 11,666        |
| Bay View     | 329           | 34           | 305           | 80           | 748           |
| <b>TOTAL</b> | <b>12,879</b> | <b>2,278</b> | <b>11,413</b> | <b>2,096</b> | <b>28,666</b> |

BUILDING APPLICATIONS BY C&I DISTRICT AND APPLICATION STATUS  
Percentage distribution by C&I District  
1990

|              | Approved   | Cancelled+ | Completed  | Others     | TOTAL      |
|--------------|------------|------------|------------|------------|------------|
| Financial    | 11         | 6          | 8          | 5          | 9          |
| Civic Center | 3          | 2          | 2          | 4          | 3          |
| Chinatown    | 2          | 4          | 2          | 2          | 2          |
| Van Ness     | 3          | 4          | 3          | 3          | 3          |
| S.of Market  | 9          | 5          | 6          | 8          | 8          |
| Mission      | 6          | 9          | 5          | 7          | 6          |
| N.Central    | 15         | 21         | 13         | 13         | 15         |
| N.West       | 9          | 19         | 14         | 11         | 12         |
| S.West       | 39         | 28         | 45         | 44         | 41         |
| Bay View     | 3          | 1          | 3          | 4          | 3          |
| <b>TOTAL</b> | <b>100</b> | <b>100</b> | <b>100</b> | <b>100</b> | <b>100</b> |

BUILDING APPLICATIONS BY C&I DISTRICT AND APPLICATION STATUS  
Percentage distribution by application disposition  
1990

|              | Approved  | Cancelled+ | Completed | Others   | TOTAL      |
|--------------|-----------|------------|-----------|----------|------------|
| Financial    | 56        | 5          | 35        | 4        | 100        |
| Civic Center | 50        | 7          | 31        | 11       | 100        |
| Chinatown    | 44        | 12         | 38        | 7        | 100        |
| Van Ness     | 40        | 11         | 41        | 8        | 100        |
| S.of Market  | 56        | 6          | 31        | 8        | 100        |
| Mission      | 45        | 11         | 35        | 9        | 100        |
| N.Central    | 48        | 12         | 34        | 7        | 100        |
| N.West       | 35        | 13         | 46        | 7        | 100        |
| S.West       | 43        | 5          | 44        | 8        | 100        |
| Bay View     | 44        | 5          | 41        | 11       | 100        |
| <b>TOTAL</b> | <b>45</b> | <b>8</b>   | <b>40</b> | <b>7</b> | <b>100</b> |

Source: Department of City Planning  
Bureau of Building Inspection

CONSTRUCTION COST OF BUILDING APPLICATIONS BY C&I DISTRICT AND STATUS  
(\$1,000)  
1990

Table 3.4.7

|              | Approved | Cancelled+ | Completed | Others  | TOTAL     |
|--------------|----------|------------|-----------|---------|-----------|
| Financial    | 230,522  | 4,181      | 48,322    | 59,273  | 342,297   |
| Civic Center | 32,405   | 524        | 3,075     | 19,634  | 55,639    |
| Chinatown    | 11,261   | 1,148      | 3,178     | 7,873   | 23,460    |
| Van Ness     | 24,777   | 848        | 3,876     | 50,202  | 79,704    |
| S.of Market  | 140,297  | 1,579      | 18,952    | 43,659  | 204,488   |
| Mission      | 30,970   | 1,405      | 5,017     | 13,859  | 51,250    |
| N.Central    | 59,625   | 4,054      | 13,863    | 27,660  | 105,203   |
| N.West       | 33,125   | 4,528      | 16,761    | 11,955  | 66,370    |
| S.West       | 156,225  | 7,854      | 33,542    | 58,551  | 256,173   |
| Bay View     | 15,198   | 1,404      | 2,940     | 6,443   | 25,987    |
| TOTAL        | 734,407  | 27,526     | 149,527   | 299,111 | 1,210,570 |

CONSTRUCTION COST OF BUILDING APPLICATIONS BY C&I DISTRICT AND STATUS  
Percentage distribution by C&I District  
1990

|              | Approved | Cancelled+ | Completed | Others | TOTAL |
|--------------|----------|------------|-----------|--------|-------|
| Financial    | 31       | 15         | 32        | 20     | 28    |
| Civic Center | 4        | 2          | 2         | 7      | 5     |
| Chinatown    | 2        | 4          | 2         | 3      | 2     |
| Van Ness     | 3        | 3          | 3         | 17     | 7     |
| S.of Market  | 19       | 6          | 13        | 15     | 17    |
| Mission      | 4        | 5          | 3         | 5      | 4     |
| N.Central    | 8        | 15         | 9         | 9      | 9     |
| N.West       | 5        | 16         | 11        | 4      | 5     |
| S.West       | 21       | 29         | 22        | 20     | 21    |
| Bay View     | 2        | 5          | 2         | 2      | 2     |
| TOTAL        | 100      | 100        | 100       | 100    | 100   |

CONSTRUCTION COST OF BUILDING APPLICATIONS BY C&I DISTRICT AND STATUS  
Percentage distribution by application disposition  
1990

|              | Approved+ | Cancelled+ | Completed | Others | TOTAL |
|--------------|-----------|------------|-----------|--------|-------|
| Financial    | 67        | 1          | 14        | 17     | 100   |
| Civic Center | 58        | 1          | 6         | 35     | 100   |
| Chinatown    | 48        | 5          | 14        | 34     | 100   |
| Van Ness     | 31        | 1          | 5         | 63     | 100   |
| S.of Market  | 69        | 1          | 9         | 21     | 100   |
| Mission      | 60        | 3          | 10        | 27     | 100   |
| N.Central    | 57        | 4          | 13        | 26     | 100   |
| N.West       | 50        | 7          | 25        | 18     | 100   |
| S.West       | 61        | 3          | 13        | 23     | 100   |
| Bay View     | 58        | 5          | 11        | 25     | 100   |
| TOTAL        | 61        | 2          | 12        | 25     | 100   |

Source:Department of City Planning  
Bureau of Building Inspection

### 3.4.2 LAND USE AND ZONING

The building permit application data described above show proposed and actual changes in the uses of buildings and land during 1990. It does not describe how existing land use activities are distributed over all of the City's land and throughout its structures. The Department of City Planning conducted a survey of the amount of land contained in different zoning districts citywide in 1989. The last time a citywide land use survey was conducted was in 1970. The Department is currently surveying and recording land use as area plans are undertaken for subareas of the city. Surveys have been done in the Central Waterfront, Northeast Mission Industrial Zone, and South Van Ness/Hayes Valley. Subsequent Commerce and Industry Inventories will include data from new surveys as they are completed.

#### 3.4.2.1 Zoning

Table 3.4.8 shows the amount of land in various zoning districts in the C&I districts. These calculations were performed by the Department of City Planning in 1989. The information is presented in acres, which include streets in addition to usable land area. The "Commercial" classification includes all of the "C" zoning districts (C-1, C-2, C-3). These are areas in which retail trade, offices, hotels and other commercial activities are generally permitted. The "Industrial" classification includes the "M" districts (M-1, M-2) where industrial activities are generally permitted. "Neighborhood Commercial" includes the various "NC" districts, which are smaller scale commercial districts with substantial residential components. "Public," or "P" districts are those owned by governments and used for public purposes. "RC," "RH," and "RM" districts are predominantly residential districts with respectively, a commercial component, a small-scale "house" character, and a "mixed" house and multi-unit character. For more description of these zoning districts, and their location, see the City Planning Code.

The acreage with different zoning classifications was not calculated by C&I District, but it can be aggregated into C&I districts with the exception of the Financial, Civic Center, North Beach/Chinatown, and Van Ness Districts which are merged into an area called "North East."

Table 3.4.8 shows that most of the commercially-zoned area (68%) is in the North East districts; that South of Market and Bay View districts together contain 94% of industrially-zoned land;

and that a large proportion of residentially-zoned land is located in the remaining districts, especially the South West, North West, and North Central districts.

In four districts (Mission, South West, North West, and North Central) RH-zoned land is the largest proportion of land. In two districts (South of Market and Bay View), industrially-

ZONING BY C&J DISTRICTS\*  
(Acres)  
1989

Table 3.4.8

| ZONING          | Neighborhood. |            |            | Public  | RC District | RH District | RM District | TOTAL    |
|-----------------|---------------|------------|------------|---------|-------------|-------------|-------------|----------|
|                 | Commercial    | Industrial | Commercial |         |             |             |             |          |
| North East*     | 794.2         | 63.6       | 128.7      | 181.2   | 244.4       | 142.6       | 345.4       | 1,900.1  |
| South of Market | 110.9         | 1,684.3    | 86.2       | 171.3   | 33.5        | 96.1        | 47.9        | 2,232.3  |
| Mission         | 122.5         | 128.3      | 237.9      | 260.3   | 1.5         | 1,881.7     | 176.7       | 2,808.9  |
| North Central   | 11.1          | 0.0        | 385.9      | 360.8   | 46.0        | 1,145.8     | 887.0       | 2,836.6  |
| North West      | 0.0           | 0.0        | 209.2      | 533.8   |             | 1,344.7     | 396.3       | 2,484.0  |
| South West      | 42.2          | 15.4       | 582.1      | 3,638.3 | 0.0         | 9,144.2     | 600.5       | 14,022.6 |
| Bay View        | 92.0          | 1,628.9    | 61.9       | 724.1   | 0.0         | 890.6       | 161.4       | 3,558.8  |
| TOTAL           | 1,172.9       | 3,522.4    | 1,691.9    | 5869.7  | 325.4       | 14,645.8    | 2,615.2     | 29,843.2 |

ZONING BY C&J DISTRICTS\*  
Percentage Distribution by C&J District

| ZONING          | Neighborhood. |            |            | Public | RC District | RH District | RM District | TOTAL |
|-----------------|---------------|------------|------------|--------|-------------|-------------|-------------|-------|
|                 | Commercial    | Industrial | Commercial |        |             |             |             |       |
| North East*     | 68            | 2          | 8          | 3      | 75          | 1           | 13          | 6     |
| South of Market | 10            | 48         | 5          | 3      | 10          | 1           | 2           | 8     |
| Mission         | 10            | 4          | 14         | 4      | 1           | 13          | 7           | 10    |
| North Central   | 1             | 0          | 23         | 6      | 14          | 8           | 34          | 9     |
| North West      | 0             | 0          | 12         | 9      | 0           | 9           | 16          | 8     |
| South West      | 4             | 0          | 34         | 62     | 0           | 62          | 23          | 47    |
| Bay View        | 8             | 46         | 4          | 12     | 0           | 6           | 6           | 12    |
| TOTAL           | 100           | 100        | 100        | 100    | 100         | 100         | 100         | 100   |

ZONING BY C&J DISTRICTS\*  
Percentage Distribution by Zoning

| ZONING          | Neighborhood. |            |            | Public | RC District | RH District | RM District | TOTAL |
|-----------------|---------------|------------|------------|--------|-------------|-------------|-------------|-------|
|                 | Commercial    | Industrial | Commercial |        |             |             |             |       |
| North East*     | 42            | 3          | 7          | 10     | 13          | 8           | 18          | 100   |
| South of Market | 5             | 76         | 4          | 8      | 2           | 4           | 2           | 100   |
| Mission         | 4             | 5          | 9          | 9      | 0           | 67          | 6           | 100   |
| North Central   | 0             | 0          | 14         | 13     | 2           | 40          | 31          | 100   |
| North West      | 0             | 0          | 8          | 22     | 0           | 64          | 16          | 100   |
| South West      | 0             | 0          | 4          | 26     | 0           | 65          | 4           | 100   |
| Bay View        | 3             | 46         | 2          | 20     | 0           | 25          | 5           | 100   |
| TOTAL           | 4             | 12         | 6          | 20     | 1           | 49          | 9           | 100   |

Source: City Planning Department, 1989

Note: \* North East District merges Financial, Civic Center, North Beach/Chinatown & Van Ness Districts. These Districts have been merged because the original data were compiled by Planning Districts.

zoned land is the largest. In the North East district, more land is zoned commercial than any of the other categories.

### 3.4.2.2. Land Use

Tables 3.4.9 and 3.4.10 display the amount of land devoted to different land uses. (The use of land may differ from its zoning since many zoning districts permit several uses and contain non-conforming uses.) The information in Table 3.4.9 was collected in 1970 by the Department of City Planning, and covers the entire city. It shows that in 1970, 40% of the city's land was devoted to residential uses (including hotels). Public uses occupied 33% of the city's land. Nine percent of the land was vacant. Other uses occupied smaller proportions of the land.

Table 3.4.10 displays more recent land use data for three areas of the city, the Central Waterfront, the Northeast Mission Industrial Zone, and the South Van Ness/Hayes Valley study area. Since 1987, whenever new area plans have been undertaken, land use surveys, using fairly consistent methodologies and formats, have been conducted. These are the first three areas to be systematically surveyed. As more area plans are undertaken, this land use data base will grow and become more useful. These data are presented here for information, even though they do not all use the same definitions of use and do not correspond to the districts that have been established for the rest of the C&I Inventory. Presenting information, developing, improving, and maintaining data sources, and interpreting and developing consistency between different data sources, are among the goals of the C&I Inventory.

This table allows a comparison between these three districts. In both the Central Waterfront and the Northeast Mission Industrial Zone, Industrial uses occupy a larger proportion of land than any other use (60% in the Central Waterfront and 40% in the Northeast Mission Industrial Zone). In the South Van Ness/Hayes Valley study area the largest use of land is office (36%). Residential uses occupy 11 to 14% of the land in the South Van Ness/Hayes Valley study area and the Northeast Mission Industrial Zone, but only 3% in the Central Waterfront.

Table 3.4.9

| Land use category        | Partial Area | Total Area | Partial % | Total % |
|--------------------------|--------------|------------|-----------|---------|
| GROSS AREA               |              | 30,500.36  |           |         |
| NET AREA                 |              | 23,101.68  |           | 100     |
| RESIDENTIAL TOTAL        |              | 9,114.31   |           | 39      |
| SINGLE FAMILY DETACHED   | 1,844.08     |            | 8         |         |
| SINGLE FAMILY ROW        | 4,234.88     |            | 18        |         |
| TWO FAMILY               | 1,174.57     |            | 5         |         |
| THREE TO FOUR FAMILY     | 584.30       |            | 3         |         |
| FIVE TO NINE FAMILY      | 362.75       |            | 2         |         |
| TEN TO FORTYNINE FAMILY  | 443.22       |            | 2         |         |
| FIFTY +                  | 106.75       |            | 0         |         |
| ROOM AND BOARD HOUSES    | 31.31        |            | 0         |         |
| HOTEL AND MOTEL          | 43.08        |            | 0         |         |
| PUBLIC HOUSING           | 289.37       |            | 1         |         |
| COMMERCE TOTAL           |              | 1,477.09   |           | 6       |
| RETAIL AND OFFICE        | 919.57       |            | 4         |         |
| GAS STATION              | 109.47       |            | 0         |         |
| PARKING GARAGE           | 32.01        |            | 0         |         |
| USED CAR OR PARKING LOT  | 399.72       |            | 2         |         |
| OTHER OPEN AIR COMMERCE  | 16.31        |            | 0         |         |
| INDUSTRY TOTAL           |              | 1,360.55   |           | 6       |
| STRUCTURAL LIGHT         | 598.92       |            | 3         |         |
| STRUCTURAL INTERMEDIATE  | 238.32       |            | 1         |         |
| STRUCTURAL HEAVY         | 269.90       |            | 1         |         |
| OPEN AIR LIGHT           | 82.07        |            | 0         |         |
| OPEN AIR INTERMEDIATE    | 77.53        |            | 0         |         |
| OPEN AIR HEAVY           | 93.82        |            | 0         |         |
| UTILITY TOTAL            |              | 563.31     |           | 2       |
| TRUCK OR BUS TERMINAL    | 83.59        |            | 0         |         |
| RAILROAD TRACKS OR TERM  | 361.42       |            | 2         |         |
| OTHER UTILITY            | 118.30       |            | 1         |         |
| INSTITUTION TOTAL        |              | 595.68     |           | 3       |
| PRIVATE OR PARC. SCHOOL  | 150.43       |            | 1         |         |
| REST HOME                | 24.14        |            | 0         |         |
| HOSPITAL                 | 166.40       |            | 1         |         |
| CHURCH                   | 158.27       |            | 1         |         |
| OTHER                    | 96.45        |            | 0         |         |
| PUBLIC TOTAL             |              | 7,594.72   |           | 33      |
| FEDERAL                  | 2,184.99     |            | 9         |         |
| STATE                    | 561.92       |            | 2         |         |
| CITY                     | 4,729.01     |            | 20        |         |
| INTERNATIONAL            | 1.73         |            | 0         |         |
| REDEVELOPMENT AGENCY     | 103.98       |            | 0         |         |
| BAY AREA RAPID TRANSIT   | 13.09        |            | 0         |         |
| PRIVATE RECREATION TOTAL |              | 311.62     |           | 1       |
| VACANT TOTAL             |              | 2,084.40   |           | 9       |
| OPEN VACANT              | 1,022.35     |            | 4         |         |
| TIDE LANDS               | 949.76       |            | 4         |         |
| BEACH                    | 112.29       |            | 0         |         |

Source: Department of City Planning

**Table 3.4.10** AREA BY LAND USE ACTIVITY AND STUDY AREA  
(Square feet)  
1987-1991

| Study Area                         | Cultural/<br>Institutional | Industrial | Office | Residential | Retail | Hotel | TOTAL  |
|------------------------------------|----------------------------|------------|--------|-------------|--------|-------|--------|
| Central Waterfront                 | 431                        | 9,533      | 4,620  | 454         | 721    | 36    | 15,795 |
| North East Mission Industrial Zone | 1,504                      | 5,828      | 2,467  | 1,581       | 2,913  | 172   | 14,465 |
| South Van Ness/Hayes Valley        | 788                        | 554        | 2,327  | 871         | 1,674  | 178   | 6,392  |
| TOTAL                              | 2,723                      | 15,936     | 9,008  | 2,917       | 5,311  | 388   | 36,883 |

AREA BY LAND USE ACTIVITY AND STUDY AREA  
Percentage distribution by Land Use Activities  
1987-1991

| Study Area                         | Cultural/<br>Institutional | Industrial | Office | Residential | Retail | Hotel | TOTAL |
|------------------------------------|----------------------------|------------|--------|-------------|--------|-------|-------|
| Central Waterfront                 | 3                          | 60         | 29     | 3           | 5      | 0     | 100   |
| North East Mission Industrial Zone | 10                         | 40         | 17     | 11          | 20     | 1     | 100   |
| South Van Ness/Hayes Valley        | 12                         | 9          | 36     | 14          | 26     | 3     | 100   |
| TOTAL                              | 7                          | 43         | 26     | 8           | 14     | 1     | 100   |

Source: Department of City Planning

**Table 3.4.11** NUMBER OF LOTS BY LAND USE ACTIVITY AND STUDY AREA  
1987-1991

| Study Area                         | Cultural/<br>Institutional | Industrial | Office | Residential | Retail | Hotel | TOTAL |
|------------------------------------|----------------------------|------------|--------|-------------|--------|-------|-------|
| Central Waterfront                 | 15                         | 236        | 179    | 103         | 42     | 0     | 575   |
| North East Mission Industrial Zone | 32                         | 181        | 95     | 252         | 173    | 10    | 743   |
| South Van Ness/Hayes Valley        | 29                         | 27         | 64     | 80          | 161    | 5     | 366   |
| TOTAL                              | 76                         | 444        | 338    | 435         | 376    | 15    | 1,684 |

NUMBER OF LOTS BY LAND USE ACTIVITY AND STUDY AREA  
Percentage distribution by Land Use Activities  
1987-1991

| Study Area                  | Cultural/<br>Institutional | Industrial | Office | Residential | Retail | Hotel | TOTAL |
|-----------------------------|----------------------------|------------|--------|-------------|--------|-------|-------|
| Central Water Front         | 3                          | 41         | 31     | 18          | 7      | 0     | 100   |
| North East Industrial Zone  | 4                          | 24         | 13     | 34          | 23     | 1     | 100   |
| South Van Ness Hayes Valley | 8                          | 7          | 17     | 22          | 44     | 1     | 100   |
| TOTAL                       | 5                          | 26         | 20     | 26          | 22     | 1     | 100   |

Source: Department of City Planning









